clearMDM vs Data 360: When to Use One or Both (Pros, Cons & Use Cases)

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As Salesforce data strategies mature, many enterprise customers are evaluating how to build the trusted customer data foundation critical to driving business productivity and staying competitive in the emerging AI era. This post considers this challenge from the perspective of the 2 approaches below.

1. Operational Master Data Management (MDM) within the Salesforce org (e.g. clearMDM).
2. Salesforce Data 360 (formerly Data Cloud), a Customer Data Platform (CDP) which extends into a broader data platform layer.

While both approaches aim to deliver customer data unification and improved data quality, they target different layers of the Salesforce data architecture. The following sections serve to clarify this distinction and to highlight where both approaches can be implemented together to deliver benefits greater than the sum of the parts.
Please note within this post the product name clearMDM and the generic term Operational MDM can be used interchangeably.

The Distinction

At a high-level:

- MDM focuses on governing and mastering data directly within the Salesforce CRM org across multiple data domains (Company, Customer, Product or Custom).
- Salesforce Data 360 focuses on aggregating and unifying data across Salesforce and external data sources at scale across Company and Customer domains.

Operational MDM vs. Data 360: A Side-by-Side Comparison

The table below provides an at-a-glance comparison of the two Salesforce data strategies.

Criteria	**Operational MDM**	**Data 360**
Primary purpose	Govern and master customer data directly inside Salesforce CRM to expediently deliver high quality operational data to line-of-business functions (e.g. Sales and Service).	Unify customer data across Salesforce and external data sources to build unified profiles for segmentation and activation.
Architecture	Runs natively within the Salesforce org. Integrates with 3rd party global data providers to deliver seamless data cleansing (verification and enrichment).	Operates as a broader data platform layer connected to Salesforce CRM (aka Salesforce Core) and other data sources.
Processing model	Data is processed directly and securely within Salesforce CRM to deliver trusted master records (aka golden records) directly for operational purposes and indirectly for segmentation and activation.	Data is ingested (copied), harmonised and unified across data sources to deliver unified profiles directly for segmentation and activation. Zero-copy architectures are also

Criteria	Operational MDM	Data 360
		supported. Attributes and aggregations can be copied back to Salesforce CRM to provide indirect operational utility.
Focus areas	Operational data quality (including real-time cleansing and enrichment and duplicate resolution), data governance and data stewardship.	Cross-system customer data unification, identity resolution, segmentation and cross-channel activation.
Operational impact	Directly improves user efficiency, process automation and reporting accuracy in Salesforce CRM.	Operational value is delivered through enrichments (field copy and related record aggregation) and through analytics, personalisation and activation.
Governance model	Embedded data stewardship and survivorship rules within Salesforce CRM processes.	Data classification. Identity, unification, and access policy rules applied across connected data sources.

Criteria	Operational MDM	Data 360
Implementation effort	Typically low as the MDM process overlays the existing Salesforce install.	Typically high due to the broader scope of data ingestion, mapping and unification across connected data sources.
Pricing model	clearMDM is licensed on a per-Production org basis with no usage costs.	Data 360 costs are usage-based (credits) with consumption factors and multipliers defined across usage types.
Optimal when	Unified customer data is required directly in Salesforce CRM and Salesforce CRM is the system of record or the primary operational platform. Also where Agentforce or generative AI platform features require defragmented Salesforce CRM data to deliver optimal outcomes.	Organisations require a cross-system customer view built from different categories of data (including unstructured) and the primary need is marketing segmentation and cross-channel activation. Also where Agentforce or generative AI platform features are optimised through RAG access to knowledge

Criteria	Operational MDM	Data 360
		including unstructured data.
Coexistence Model	Can provide high quality, governed Salesforce CRM data that supports the broader data strategy. Can reduce the amount of data processed across Data 360 ingestion, harmonisation and unification activities and thereby directly reduce credit consumption and cost. In particular, the Identity Resolution usage type has one of the highest credit consumption multipliers.	Can complement operational MDM by extending unified data across the broader system landscape.

Operational MDM Pros, Cons and Use Cases

1. Salesforce CRM Native

Operational MDM operates directly on Salesforce objects, enabling:

- Real-time data cleanse and enrichment.
- Real-time deduplication and merge logic.
- Survivorship rules applied at the point of data-entry or data-change (manual, API etc.).
- Data Stewardship workflows embedded into CRM processes.

Data governance and quality actions are enforced where work happens, not after the fact.

Considerations:

- Operational MDM is optimised for data inside Salesforce CRM, not as a full cross-cloud data platform.
- Best suited when Salesforce CRM is the system of record for customer data or a primary operational system.

2. Operational Impact

Because mastered data lives in Salesforce CRM:

- Sales and Service teams see higher quality, unified Accounts and Contacts instantly.
- Reports and dashboards accuracy improves without data replication latency.
- Process automations (Flows, Apex etc.) execute on trusted data.
- A unified, trusted, AI-ready customer data foundation is established that powers the Generative AI features of the Salesforce platform.

Considerations:

- Operational MDM should not be considered a CDP or data platform replacement. Key capabilities missing include aggregation of event, engagement and behavioural data, cross-channel activation, reference to external data sets and advanced, centralised analytics.

3. Cost of Ownership

Operational MDM extends the Salesforce CRM environment with data management capabilities which:

- Provide a familiar setup experience for Salesforce administrators.
- Enable a reduced implementation timeframe.
- Protect data security as there is no duplication of customer data and no connectivity or transport to external systems.
- Support a simplified, fixed licensing cost.

Considerations:

- The cost of data storage in Salesforce CRM is high in comparison to data platforms.
- Efficient management of large data volumes in Salesforce CRM requires expertise and investment.

Data 360 Pros, Cons and Use Cases

1. Data Unification across Salesforce and External Data Sources

Data 360 excels in high-scale data ingestion, harmonisation (to a canonical model) and identity resolution which:

- Enable data to be connected of any type (structured and unstructured).
- Create unified profiles across all touch-points by connecting identities with engagement and behavioural data.
- Support data residency and hosting options designed to meet business and regulatory requirements.

Considerations:

- Unified customer data originating in Salesforce CRM are not merged and therefore duplicate or inconsistent records can still exist in Salesforce CRM.
- Process automations in Salesforce CRM will require refactoring to mitigate the risk that operational processes still rely on imperfect Salesforce CRM data.

2. Segmentation and Activation

Data 360 primary use cases relate to the unification of disparate customer datasets in order to:

- Apply advanced, AI-driven segmentation logic to deliver optimised audiences.
- Calculate AI-driven insights drawn from diverse categories and sources of data.
- Activate audiences across multiple channels.

Considerations:

- For non-technical users there may be a steep learning curve or the requirement to engage with technical resources for setup and maintenance tasks.
- Data mapping is required for all data sources, the concept of schema-less ingestion does not exist in Data 360.

3. Cost of Ownership

Data 360 provides standardised, flexible tools integrated with the Salesforce CRM UI which:

- Provide a seamlessly integrated setup experience and shared user population.
- Enable a standardised, repeatable approach to most operations such as connecting external data sources.
- Supports zero-copy options.

Considerations:

- Every interaction with a record incurs a usage cost and this cumulative effect can result in high costs across the lifecycle.
- The implementation complexity is considered to be high which can result in slow time-to-value and introduces a reliance on partner technical expertise and billing expertise (the accurate estimation of costs during project scoping can be challenging).
- The separation from operational systems can result in changes not always being reflected back in real-time and compliance issues as governance is not embedded into day-to-day user workflows.

In Summary: Salesforce Data Strategy Guidance

Operational MDM is optimal when:

- Salesforce CRM is your **System of Record** for **Customer** data.
- Your priority is **data quality**, **duplicate resolution** and **data governance** in Salesforce CRM.
- You require **real-time, operational impact**.
- You want to empower **Salesforce Admins**.

Data 360 (formerly Data Cloud) is optimal when:

- You need a **Unified Customer View** across **multiple systems**.
- You're priority is **marketing segmentation and activation** and/or **AI driven engagement.**
- You have **large volumes of behavioural or event data**.
- Your **data architecture** extends beyond Salesforce CRM.

Finally, an alternative approach Operational MDM plus Data 360:

For many organisations, this is not an either/or decision and a hybrid approach is optimal where Operational MDM governs and masters data inside Salesforce CRM and Data 360 aggregates and activates Salesforce data and external data sources across the enterprise.

- Operational MDM ensures that Salesforce CRM data is clean, accurate, deduplicated and governed.
- Data 360 builds the enterprise level customer profile and enables cross-channel activation.

This hybrid approach allows organisations to maintain high-trust operational data whilst also enabling advanced AI-driven analytics and engagement.