

Beyond Deduplication: Why Customer 360 Requires Relationship Context

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Most Salesforce organisations understand the importance of reducing duplicate records. Duplicates impact reporting accuracy, reduce user confidence and create operational inefficiencies across sales, service and marketing teams. As a result, many organisations begin their data quality journey by implementing duplicate management tools, matching rules or data cleansing initiatives.

However, while deduplication is important, it is only one step towards building a trusted customer data foundation.

Customer 360 Requires More Than a Single Customer Record

A unified customer profile may help answer the question:

“Who is this customer?”

But Customer 360 requires a broader understanding of the customer and the relationships that shape their interactions, behaviours and business value.

Understanding who a customer is matters but understanding how they relate to other customers, households, colleagues, organisations and networks often matters just as much.

This article is the first in our **Beyond Deduplication** series, exploring why enterprise Salesforce organisations are increasingly looking beyond traditional deduplication approaches when building trusted customer data foundations for Customer 360, Agentforce and Data 360.

We begin with a capability that is often overlooked but fundamental to understanding customers: relationship context.

Deduplication Solves One Problem

At its core, deduplication answers a simple question:

Do these records represent the same customer?

Matching algorithms, fuzzy logic and survivorship rules help organisations identify and unify duplicate customer records into a trusted Golden Record.

This is an important capability, without it, reporting becomes unreliable, customer interactions become fragmented and Customer 360 initiatives become significantly harder to achieve. However, identifying that two records represent the same customer is only part of the story.

Why Deduplication Stops Short

Deduplication identifies records that represent the same customer.

It does not typically:

- Understand household relationships
- Model customer-to-customer connections
- Manage professional networks
- Govern relationship lifecycles
- Maintain relationship history over time

As a result, organisations may successfully remove duplicates while still lacking critical customer context. A customer record may be accurate, complete and trusted, but without understanding how that customer relates to others, important business insights can remain hidden.

This is where [Operational Master Data Management](#) extends beyond traditional data quality and deduplication approaches.

Customer Data Is About More Than Individual Records

Real-world customers do not exist in isolation; they exist within networks of relationships. A customer may belong to a household. They may be related to other customers. They may work alongside colleagues, belong to the same organisation, share interests or behavioural factors, or participate in a buying group.

Understanding these relationships often provides valuable business context that cannot be derived from an individual customer record alone.

Examples include:

- Household relationships
- Family members
- Colleagues and coworkers
- Professional contacts
- Parent and subsidiary organisations
- Franchise operators
- Buying groups
- Partner networks

In many cases, these relationships are just as important as the customer record itself.

Why Relationships Matter for Customer 360

Customer 360 is often described as a single, unified customer profile.

In practice, organisations need more than a single profile, they need context. Consider a retail organisation. A customer may have a complete Golden Record containing validated contact information, purchase history, loyalty activity and service interactions.

However, additional questions often remain unanswered:

- Which other customers belong to the same household?
- Are purchases being made across multiple family members?
- Which customers influence buying decisions?
- Which relationships should be considered when delivering personalised experiences?

Similarly, in B2B environments:

- Which contacts work together?
- Which organisations are related?
- Which individuals participate in the same buying process?

Without relationship context, Customer 360 initiatives frequently provide only a partial view of reality.

Relationships Create Business Value

The value of customer relationships extends far beyond data quality.

Relationship-aware customer data can help organisations:

- Improve customer service experiences
- Better understand customer behaviour
- Deliver more relevant engagement
- Improve segmentation and targeting
- Support more accurate analytics
- Strengthen Customer 360 initiatives
- Improve customer retention strategies
- Enhance governance and auditability

In short, organisations gain a richer understanding of their customers and the networks in which they operate.

Why Relationships Matter for AI and Agentforce

As organisations introduce AI agents into customer-facing and operational processes, such as [Agentforce-powered data stewardship](#), relationship context becomes increasingly important.

A customer record alone may not provide sufficient information for an AI agent to make informed decisions.

Understanding household relationships, colleague networks, related organisations and customer hierarchies can provide additional context that improves the quality of AI-driven interactions and recommendations.

Trusted customer data is important. Trusted customer relationships are equally important.

As AI becomes more deeply embedded into Salesforce workflows, relationship-aware customer data will become an increasingly valuable asset.

Why This Is an Operational MDM Challenge

Traditional deduplication tools focus primarily on identifying and resolving duplicate records.

Operational Master Data Management addresses a broader challenge, it creates and continuously maintains trusted customer data over time.

This includes:

- Data quality
- Matching
- Golden Records
- Stewardship
- Governance
- Data lineage
- Relationship management

The goal is not simply to remove duplicates, the goal is to create a trusted customer data foundation that accurately reflects both customer identities and the relationships that connect them.

Relationships in the Summer '26 Release

The clearMDM Summer '26 release introduces flexible relationship management capabilities that allow customers to be connected through virtually any type of relationship directly inside Salesforce.

Examples include:

- Household relationships
- Family relationships
- Colleague relationships
- Professional networks
- Custom relationship types

By combining trusted Golden Records with governed relationship management, organisations can move beyond simple duplicate reduction and begin building richer Customer 360 views that reflect how customers are actually connected.

Beyond Deduplication Series

This article is part of our **Beyond Deduplication** series exploring how enterprise Salesforce organisations build trusted customer data foundations inside Salesforce.

Part 1: Why Customer 360 Requires Relationship Context

Coming Soon:

- Why Customer 360 Requires Golden Records
- Why Customer 360 Requires Survivorship Rules
- Why Customer 360 Requires Data Stewardship
- Why Customer 360 Requires Data Lineage
- Why Agentforce Requires Trusted Customer Data

Looking Ahead

Deduplication remains an important capability. However, a trusted customer data foundation requires more than identifying duplicate records. It requires understanding how customers relate to one another and preserving that context over time.

Customer 360 is not simply about creating a single customer record. It is about understanding customers in context. That context includes not only who customers are, but how they relate to the people, organisations and networks around them.

In the next article in our **Beyond Deduplication** series, we'll explore another area where enterprise Salesforce organisations often outgrow traditional deduplication approaches: Golden Records and survivorship rules.