

A smiling woman with dark hair, wearing a blue and white striped dress and a light-colored cardigan, stands with her arms crossed in a bright office setting. A large yellow brushstroke graphic is on the left side of the image, containing the text.

# Increase Sales Efficiencies with Clean Data

A  Case Study

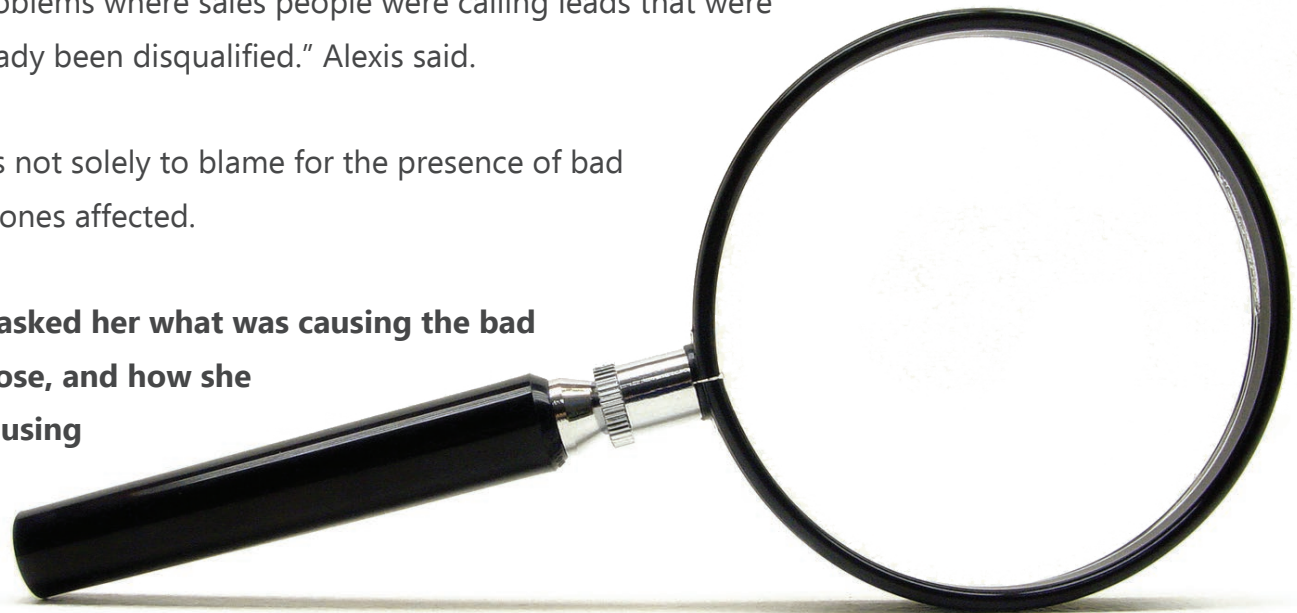
*"When you enter a lead, make sure you search for a duplicate first."*

If you're the person responsible for data quality management and maintenance of your company's Salesforce org, you've probably attempted to drill into your users' minds the command: "When you enter a lead, make sure you search for a duplicate first." But if your users are anything like Alexis Grau's, CRM Systems Manager for Lucid Design Group, they don't always heed your advice.

Any experienced Salesforce admin will agree that when duplicate records are present in Salesforce, bad things happen. "We had a lot of problems where sales people were calling leads that were duplicates and that had already been disqualified." Alexis said.

However, the sales team was not solely to blame for the presence of bad data nor were they the only ones affected.

**We spoke with Alexis and asked her what was causing the bad data, the problems that arose, and how she was able to clean her data using Cloudingo.**



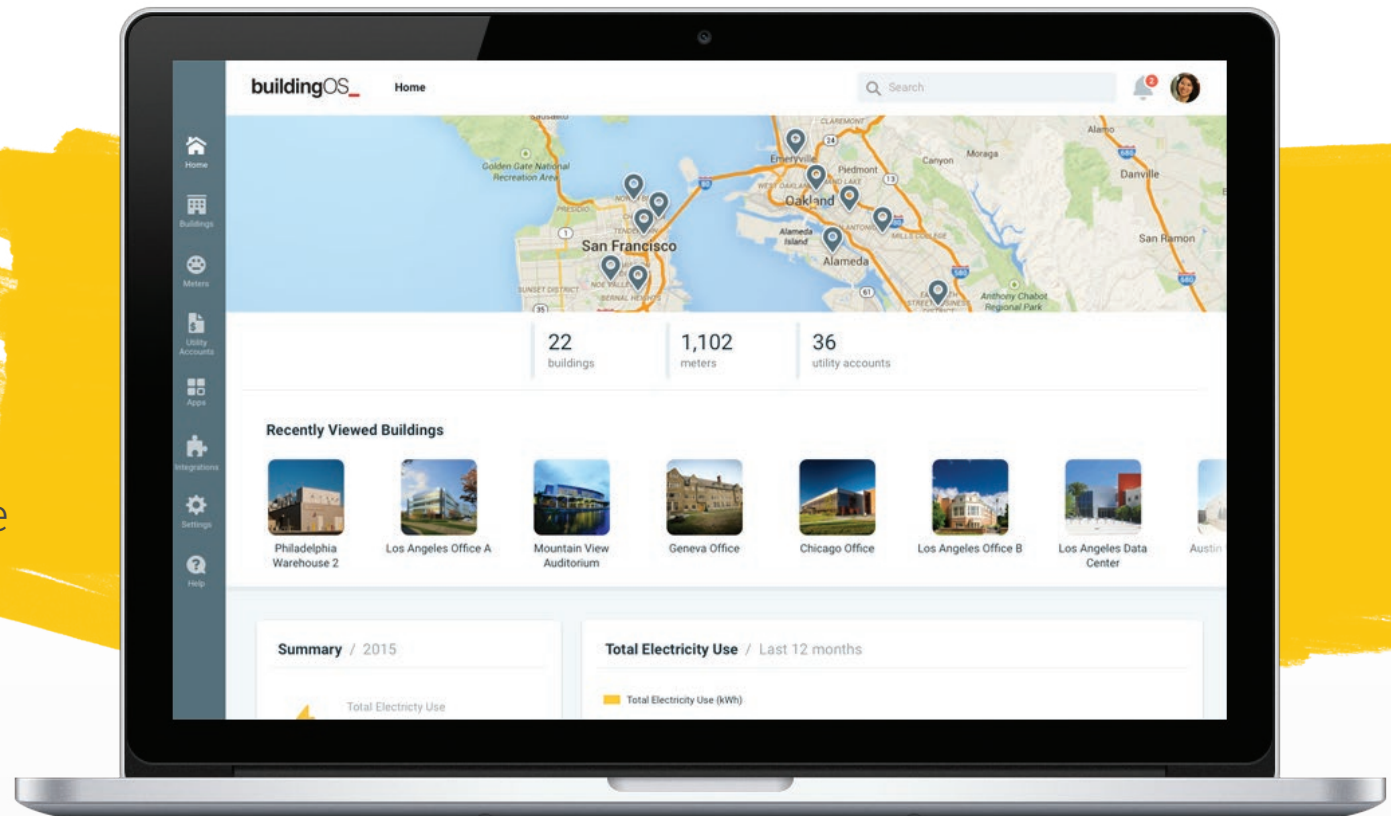
# First, let's meet **lucid**.

Lucid connects people to buildings, empowering organizations to make smarter decisions that reduce costs, improve occupant comfort, and accelerate team productivity. Their operating system, BuildingOS, collects different data points such as gas and water usage, giving companies visibility into how they're using energy. With this data companies can identify inefficiencies, scale up or down as needed, and make schedules to limit unnecessary uses of resources.

**50** Salesforce  
Users

**1** Salesforce  
Admin

**75,000+** Salesforce  
Records





A man with glasses and a beard, wearing a yellow sweater over a blue and white checkered shirt, is sitting at a desk and looking at a laptop. A woman with long dark hair, wearing a black and white striped shirt, is standing behind him, pointing at the laptop screen. The background is a bright, out-of-focus indoor setting.

# The Story

**Stephen Harding, Cloudingo team member:** What were the signs that made you realize your data problem was big enough that it was time to do something about it?

**Alexis Grau:** The sales team was wasting time calling the wrong people, and they were frustrated. They were calling leads who were employees of companies that were already customers. Plus we were outsourcing lead generation and lead nurturing, and it turned out that we were nurturing leads that were already customers or already disqualified, or someone was already working them. We didn't need to pay to have those leads created or nurtured. It was a waste of money and a waste of time.

*"We're a data company, so for us to not have that data is embarrassing. We really needed to get a handle on that."*

**SH:** It sounds like the problem was effecting Sales primarily, but also Marketing?

**AG:** Yes. We had a lack of visibility into which customers we already had from a lead level. Our VP of Marketing was trying to identify our target accounts, look at the health of our pipeline, how many leads we had. We're a data company, so for us to not have that data is embarrassing. We really needed to get a handle on that.



**SH: How often was the lack of visibility into your accounts a problem?**

**AG:** Sales was regularly reaching out to notify me of duplicates. We've taken away the delete permission on certain objects to keep things clean and prevent users from accidentally deleting something. But the problem with merging leads is that it requires the delete permission. We were at this point where I was the only admin, and Sales was coming to me constantly asking me to merge all these duplicate leads.

**SH: Wow, so you were manually trying to clean your data and delete the dupes. How did that work for you?**

**AG:** I gotta say, I actually blocked that time out of my mind! It was a lot of work – looking line by line, matching company email addresses, and saying 'Okay, this is a duplicate.' I spent hours and hours manually merging and converting records as they were discovered. It got to the point where I couldn't spend a full eight hours a day managing duplicates. We had reached the tipping point.

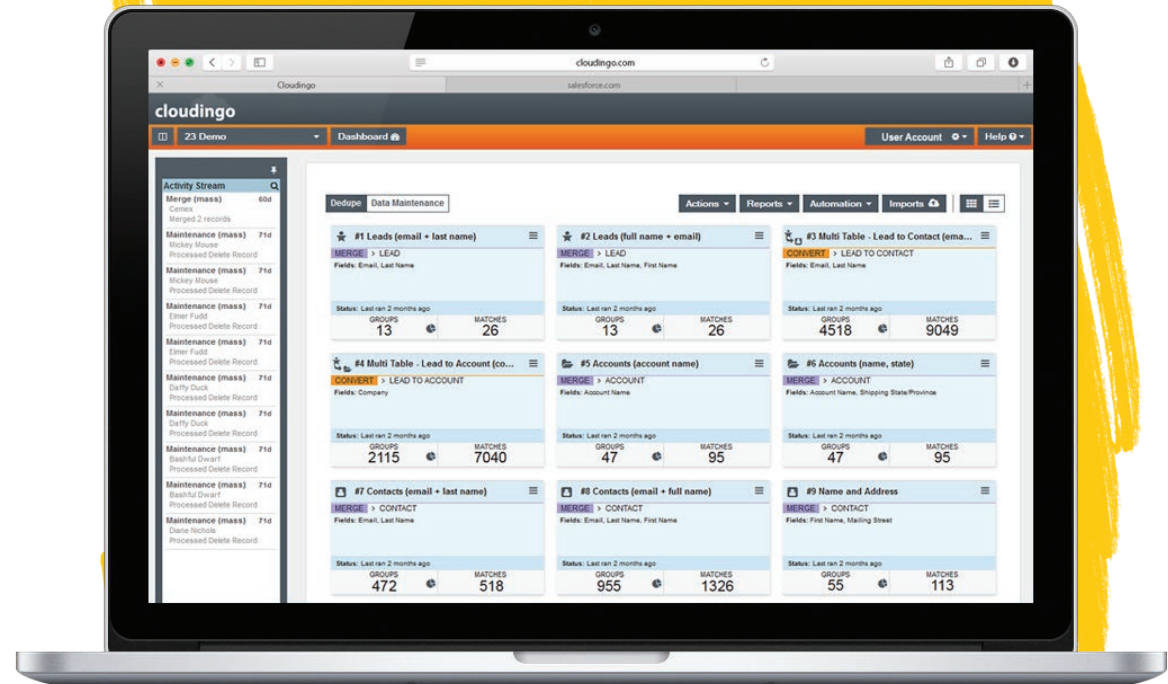
*"It got to the point where I couldn't spend a full eight hours a day managing duplicates."*



Looking for a long-term solution that would save her time and fix the duplication problem, Alexis found Cloudingo.

**SH:** What were the winning factors that made you decide to purchase Cloudingo over other solutions?

**AG:** When we got Cloudingo I said, "I can't believe I did anything else before this!" I liked the ease with which dupes could be identified and merged and converted. Additionally, automation was an important factor. I love automation; it makes my job easier. We would need a full-time employee to do what Cloudingo does automatically.



*"When we got Cloudingo I said, 'I can't believe I did anything else before this!'"*

**SH:** I love hearing how much of a help Cloudingo was for you. You were pretty excited to get started. Did you have any hesitations or problems?

**AG:** We were so excited! We jumped right in... and that was our mistake. We didn't fully understand the repercussions.

One thing we did was setup a fuzzy name match on account name. An example was Boston College and Boston University. Those records would get merged together. That was my fault for jumping in and getting excited and not fully understanding the ramifications of what would happen. Now I know more and have learned from that.

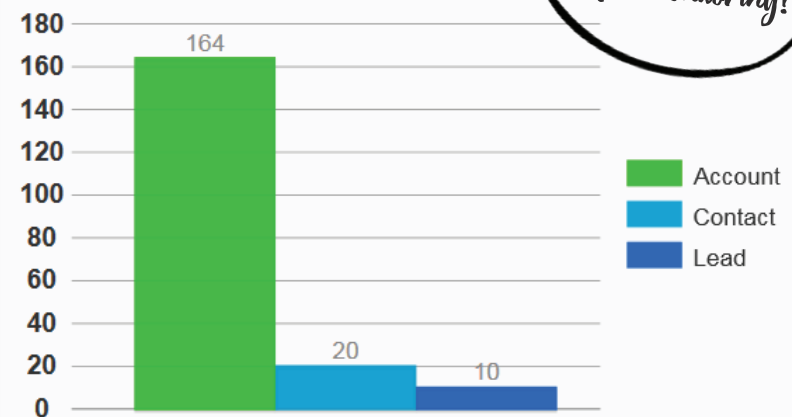
## Dedupe Audit Summary



- Convert - Lead to Account
- Convert - Lead to Contact
- Merge - Contact
- Merge - Lead

*Lucid's biggest culprit of duplicates hid in their Contact records. Their second largest area of concern was the number of duplicate leads for existing accounts that were present.*

## Dedupe Filter Counts Report




*Real-time  
dupe monitoring!*


*At any time, Cloudingo users can see how many duplicates currently exist in their org. Like most companies whose data is dynamic and always changing, Lucid uses Cloudingo on a continual basis to maintain clean, dupe-free data.*







## Cloudingo Dos and Don'ts

 **Do preview a couple of duplicate matches.** Each time you build or edit a filter, check to see what your final record will look like. Revise or add more matching criteria if you're not satisfied with the result.

 **Do perform multiple scans of your data.** Vary the criteria each time to ensure you find all of your dupes.

 **Don't just do a one-time cleanse.** Continual ongoing maintenance is key. As your data changes and as more records are added, more maintenance is required.

 **Don't be scared.** A lot of people are hesitant at first to change their data, especially in bulk or via automation. The more you use Cloudingo and trust that your filters are performing to your needs, the more confidence you'll have.

**SH:** You're not alone. A lot of our customers get overly ambitious at the start without fully taking time to plan out scenarios or take advantage of our expertise.

**AG:** It was a lesson that this tool is powerful and it does a lot of good things, but we have to be sure to take the time to set our filters up properly otherwise it yields completely unexpected results. It's a matter of taking the time and being very thoughtful about the process, making sure the automation rules are correct, making sure the filters are appropriate. We have automation set up for Leads on exact email match and that's excellent. We have no issues there. Exact email? Merge them! Done.

Since we first started using the application, Cloudingo has made some updates too that have made it easier to review matches and choose the fields that are most updated, like field ordering which is very helpful.

**15%** of Lucid's data was duplicates

**SH: Now that your data is clean, how are you continuing to maintain it and keep it clean?**

**AG:** Once a month we go through specific filters to ensure that any account that has recently become a customer has all related leads converted under it. We also use that time to review other filters and clean up records, though since implementing marketing automation we have had less dupes than before.

**SH: What advice would you give to another admin who is thinking about data quality?**

**AG:** Putting the right tools in place to ensure your data is clean is essential to your business. Management gets better analytics. Sales streamlines their workflows. Marketing doesn't waste time or money on leads that may already be in the system. It's worth investing in a tool that will make the de-duping process a breeze.

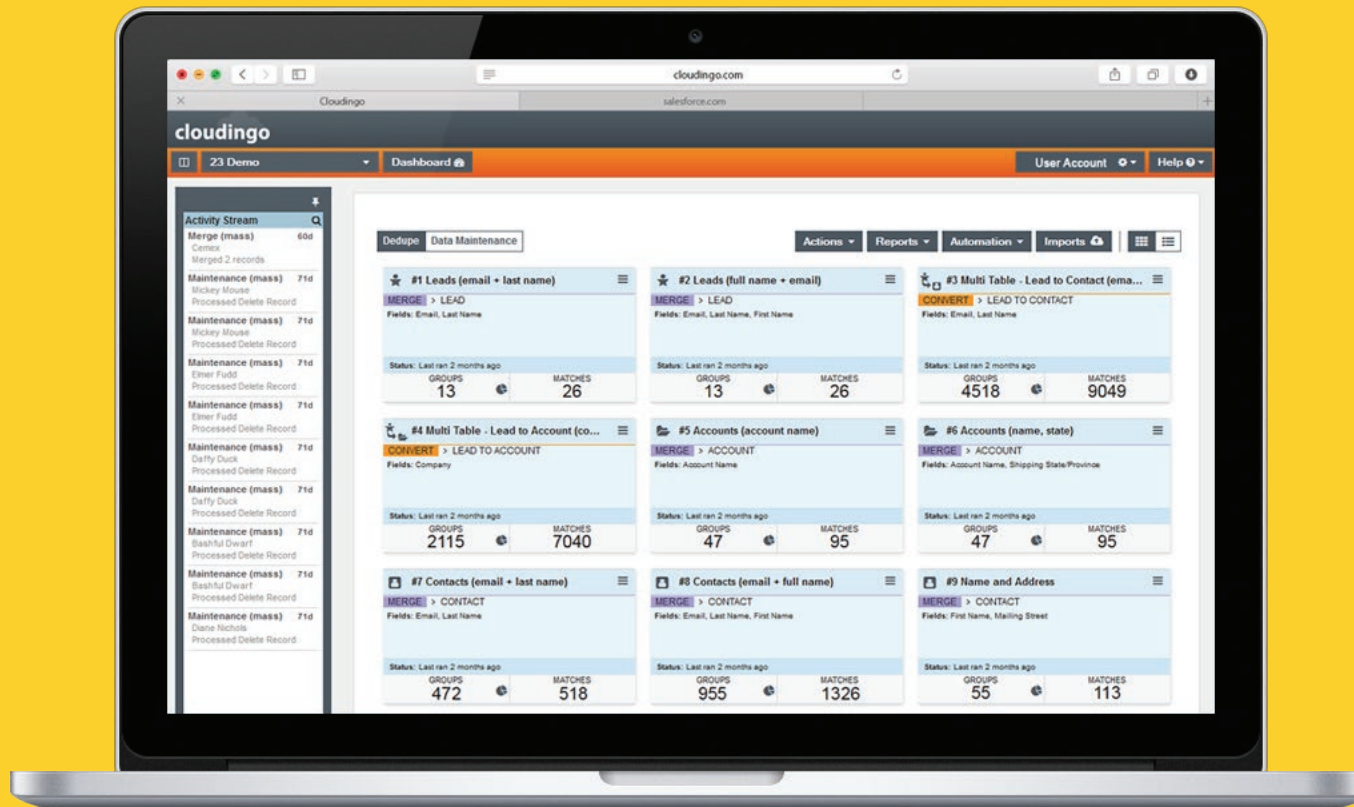
*"Putting the right tools in place to ensure your data is clean is essential to your business."*



# What can Cloudingo do for you?

Start a free trial and receive a data health check at no charge.

No credit card required. No pressure. No more dupes.



*"We would need a full-time employee to do what Cloudingo does automatically."*

Visit [cloudingo.com](https://cloudingo.com) and get started.