

A man with short brown hair, a light beard, and black-rimmed glasses is smiling at the camera. He is wearing a dark blue suit jacket over a light blue striped shirt and a dark tie. He is sitting at a white desk, holding a black pen in his right hand. On the desk are several stacks of papers. The background is a bright, out-of-focus office space with a bookshelf and large windows.

How Clean Data Can Enhance Customer Relations and Maintain Credibility

A **cloudingo** Case Study

"Please, don't ever call me again."

Credibility was lost with customers. Clients were annoyed with reps repeatedly calling over and over again. Sales teams and appointment setters were frustrated with losing business. The culprit was a messy database filled with duplicate records.

For Brooke Van Remoortere, Sales Operations Manager and lead Salesforce admin for 1-800Accountant, finding a way to revitalize the customer experience was a top priority. The first challenge was to cleanup existing dirty data that had been migrated to Salesforce from a previous CRM. The second challenge was to figure out a way to keep the data clean.

Using Cloudingo, Brooke was able to identify her bad data problems, handle the data clean up, and establish a plan for ongoing maintenance to tame bad data.

Here is her story...



First, let's meet 1-800ACCOUNTANTSM

Bringing the accounting industry into the 21st century has been the goal of 1-800Accountant since its inception over fifteen years ago. Their team consists of Certified Public Accountants (CPA's), Enrolled Agents (EA's), and other experts dedicated to making accounting and taxes easy and affordable for individuals and small-business. Customers count on them to provide flat-fee services that take the worry and drudgery out of business accounting, bookkeeping, and tax planning or preparation.

Their headquarters are in New York, New York, but most of their business is done virtually.

High-level view of 1-800Accountant's Salesforce setup



158

Salesforce Users



3

Salesforce Admins



500,000+

and growing daily
Salesforce Records

The Story

Courtney Schexnayder, Cloudingo team member:
How important of a system is Salesforce to your overall business?

Brooke Van Remoortere: It's definitely the most critical system we have and a big investment for us. From client-retention, sales, marketing, customer service – everything is run through Salesforce. It's the single most important system we have. It's our bread and butter.

CS: Before you started cleaning your data, what were the problems you were seeing in your Salesforce org?

BVR: Well, it was a two-fold issue. One was moving all of our existing data from our old CRM into Salesforce. That data was already dirty. And the second prong

*"... everything is run through Salesforce...
It's our bread and butter."*



was, when we receive leads. A lot of time we get duplicates. So what ended up happening was we would have one customer in our system ten different ways and we'd be reaching out to them ten different times, especially from a Sales perspective.

CS: Besides from just having a bloated Salesforce org, what was at stake with so much redundant data?

BVR: Not only did we come off as unprofessional, but it also damaged our client experience. We definitely recognized that we had a big issue with duplicates in our system, and being able to fix those and have that person in our system only once was definitely going to help us bring them on as a client and keep them happy.

CS: How often were you seeing this happen?

BVR: One of every five calls resulted in the client telling us they had already or just been contacted. We were losing credibility as a company. Our sales reps and appointment setters were frustrated by calling people multiple times.

A point in time of what 1-800Accountant had to deal with:



**Leads with the same
Email and Last Name**



**Leads with the same
Last Name and Phone
Number**



**Leads converted to
Contacts**



**Accounts with the same
Account Name**



CS: Were you hearing direct complaints from your customer and prospect base or was your sales team coming to you saying, “Brooke, this isn’t working. I’m wasting my time.”?

BVR: Our sales reps and appointment setters would basically hang up the phone and be like, “Man, another one!” Sitting in the same office I’d hear that over and over again and I realized there was definitely something going on.

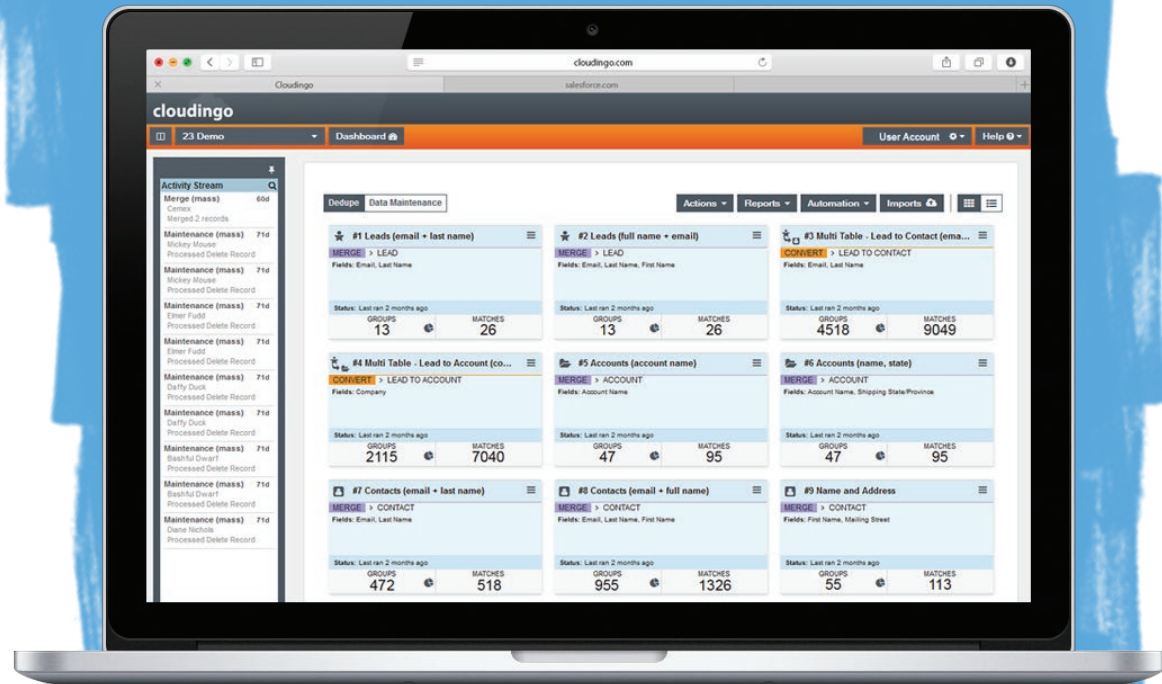
Appointment setters were annoying our prospects so they wouldn’t get the appointment. There were people that we called too many times and said, “Please don’t ever call me again.” I know we lost business because of this. I felt bad because we have a product they needed. But if we’re annoying, I wouldn’t buy from us either.

“I know we lost business because of this.”

In an attempt to save 1-800Accountant's reputation and customer experience, Brooke found Cloudingo to clean up her org.

CS: How did you find out about Cloudingo?

BVR: Our CTO had given me a tool to upload leads into Salesforce. But we recognized when we did that, we were creating even more duplicates. We had a conversation and I told him, "This is a great tool. It's quick and easy to use, but we're causing ourselves some problems." Our CTO did some research and came across Cloudingo and said, "I think Cloudingo is going to be a good fit for us. It does importing and also solves duplication issues."



"... Cloudingo is going to be a good fit for us. It does importing and also solves duplication issues."

CS: What was your initial experience like with Cloudingo?

BVR: It was pretty intuitive. I watched some of the tutorial videos. You have a few basic filters already setup when you start so I was like, "Okay, I'll go in and look and see what these say." After I started looking at the data I was like, "Now I see why Cloudingo is pulling certain records in this way." It made a lot more sense.

CS: Did you have any hesitations?

BVR: To be honest I think a lot of it was that I didn't think

I knew enough to make it work. Salesforce was all new to me. My hesitation was more about, "Do I know enough to make [Cloudingo and Salesforce] work together?" It didn't have to do with the programs themselves; it was just getting comfortable with both of the systems.

CS: Earlier when you discussed how you learned about Cloudingo, you mentioned a need for an import tool?

BVR: Yes! I do about five imports a week, all on Fridays. On Fridays half of my day is spent working with Cloudingo to do the importing.

Total Duplicates

(Real-time Totals)

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, 1-800Accountant uses Cloudingo on a continual basis to maintain clean, dupe-free data.

Real-time count of duplicate records in 1-800Accountant's org:



CS: You decided to use Cloudingo to clean up your org and for imports, but have you found any unexpected benefits of using it?

BVR: What Cloudingo really does for me is it helps me find problems faster. When we get leads through our API, which happens in the middle of the night, there's no one watching or reviewing that process. It's very obvious when we have API issues with our lead sources. Duplicates show up quickly and I know what to look for because Cloudingo makes it visually accessible. I can log into Cloudingo in the morning and say, "Wow, this filter just jumped up from ten matches yesterday to 300 today. Something obviously happened last night." That's what the real benefit for me has been in terms of being able to recognize problems.

CS: How is your data continuing to change and how are you maintaining it?

BVR: As we add new lead sources, we find that some of our potential customers come to us multiple times from different places. It's easy to spot those people now. And we maintain our clean data by looking at our filters each day and editing them based on available new information.

Duplicates Eliminated

(Over a 12 month period)

Of 1-800Accountant's total leads, 17% were duplicates. Their second largest area of concern was the number of contacts duplicated by leads that were present.

Total duplicated records removed from 1-800Accountant's org:



CS: The last thing I'd like to ask is what advice would you give to another admin who is thinking about data quality?

BVR: Cloudingo is a lifesaver! I can import and dedupe at the same time. It's easy to learn and use. Duplicates can ruin your employees' loyalty and trust in their client information. Plus clients were irritated and disinterested in using our services despite their need. Knowing there is a system in the background keeping everything clean is a huge comfort.

And I want to add that every time I've reached out to your support team, I've always had a very prompt response. They've always helped and then followed up to make sure everything is working correctly. Off the top of my head, I think the person I end up talking to the most is Jenny. Jenny always helps me. We're like best friends on the internet, you know?!

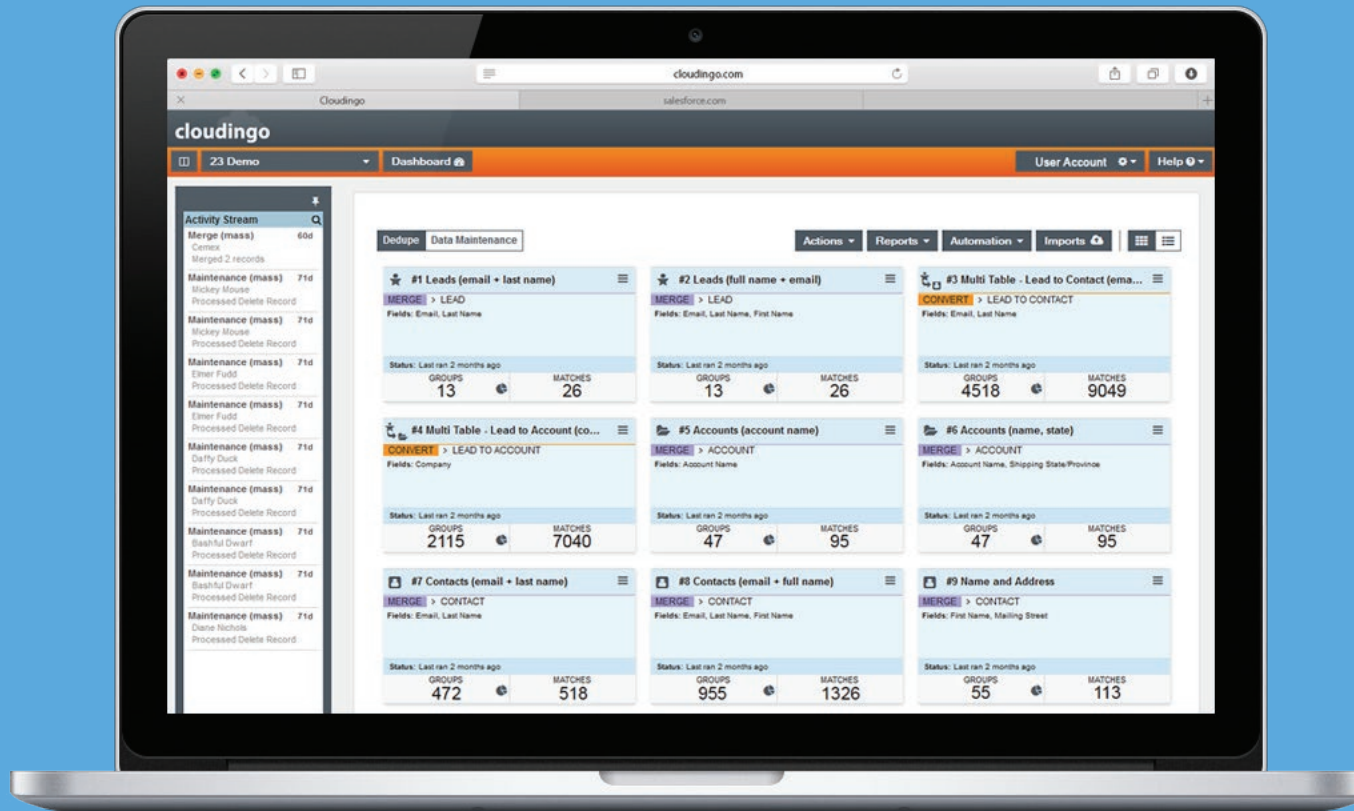
"Knowing there is a system in the background keeping everything clean is a huge comfort."



What can Cloudingo do for you?

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"Cloudingo is a lifesaver!"

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