

ENHANCE YOUR DATA QUALITY

**Use this checklist to assess and improve your data quality instantly!
These quick steps get you closer to best-practices and industry standards while helping identify areas for improvement.**

LEVERAGE ONGOING DUPLICATE MANAGEMENT TOOLS



Use Salesforce duplicate rules and matching rules to catch duplicates as users create or update records. Enable alerts and auto-blocking where appropriate. Pair Native tools with third-party apps for high-volume or fuzzy-match detection.

REGULARLY IDENTIFY AND MERGE DUPLICATES



After setting up the tools mentioned above, set a cadence to review and merge duplicate records in your org, for organizations that have minimal data quality concerns we recommend Quarterly. Remember to also train and refresh your users on best practices for avoiding duplicates!

STREAMLINE LIGHTNING PAGES BY ROLE



Review page layouts to ensure only relevant fields are displayed for each role/permission set group. Overloaded or inconsistent layouts can lead to poor data entry and missed insights. Keep layouts clean, role-based, and process focused.

ENABLE FIELD HISTORY TRACKING FOR KEY FIELDS



Track changes to critical fields to monitor data integrity and audit trends over time. Enable field tracking history in Setup, especially for revenue-impacting fields. Best part... Changes tracked are REPORTABLE!

DEFINE A DATA STEWARDSHIP PLAN



Assign clear data management roles to ensure someone is accountable for data quality. A simple plan outlines ownership, processes, and audit cadences. This can be managed internally or externally via managed services.