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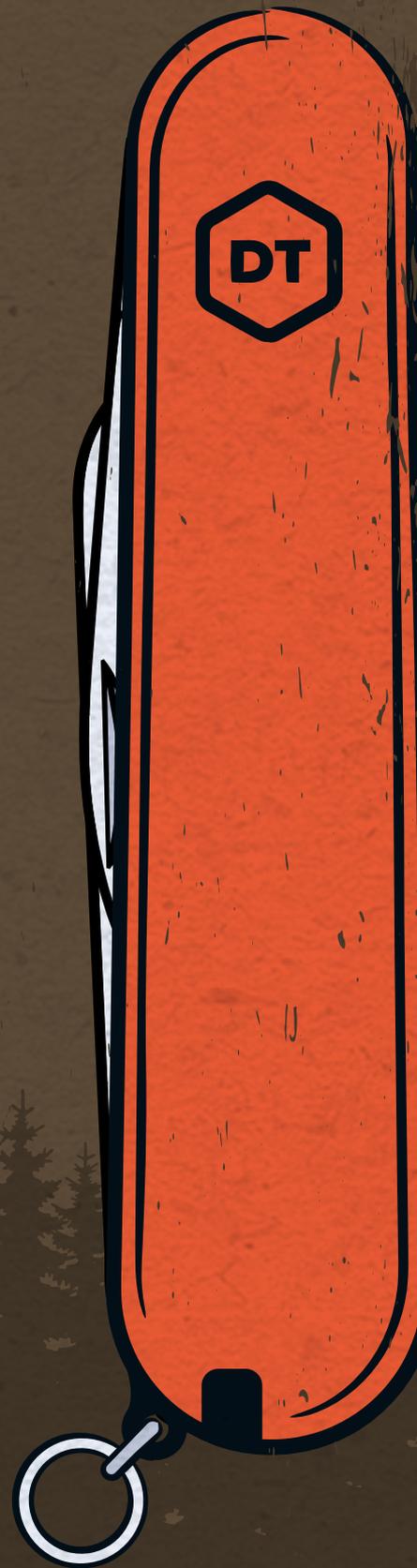
THE DATA MANAGER'S FIELD GUIDE

Finding the Right Tools to Navigate
Today's Data Wilderness

WHAT'S INSIDE

A "SWISS ARMY KNIFE" FOR TODAY'S DATA MANAGERS

Data managers play a critical role in the success of today's enterprise businesses. At first glance, their responsibilities might seem relatively straightforward. But the reality is, their job is incredibly complex and its execution requires a delicate balance between detail-oriented process management and creative problem solving.

Companies invest a lot of money in their CRM systems, and they expect to see results in the form of increased workflow efficiency, enhanced analysis of their customer data, improved cross-sell/up-sell results, and better customer relationships. All of this requires the skill and expertise of a data manager, who is responsible for:

- **Ensuring CRM data is clean, accurate, and reliable**

- **Managing highly complex data in bulk**

- **Standardizing data structure, standards, and processes to improve operational efficiency**

- **Providing accurate reports that drive smart business decisions**

- **Making CRM data accessible and usable across the organization**

Every day, data managers face countless hazards and pitfalls that threaten their ability to maintain high-quality CRM data their organization can rely on. That's why we've created The Data Manager's Survival Guide. This guide is intended to serve as a reference to help today's data managers navigate their everyday obstacles and prepare for the unknown perils ahead.

To do their job effectively, data managers need the right tools–and they need those tools to work together, seamlessly and on-demand. For nearly two decades, Validity's DemandTools has served as the ultimate survival tool for data managers. In fact, it's often called a "Swiss Army knife" for data managers, with features and functionality that can truly do it all–from deduplication and standardization, to sophisticated data management capabilities that keep your CRM free of junk data.

From top to bottom, DemandTools is a thoughtful, versatile solution that addresses the core needs of data managers and tackles the inevitable issues that plague any CRM. Its capabilities are so robust that users may not even be aware of some of its most useful features.

In this guide we'll take a closer look at each module of this "Swiss Army knife" solution. From the most common module to the most specialized, the DemandTools suite provides the all-in-one solution data managers need to "survive" in the wilds of today's data wilderness.
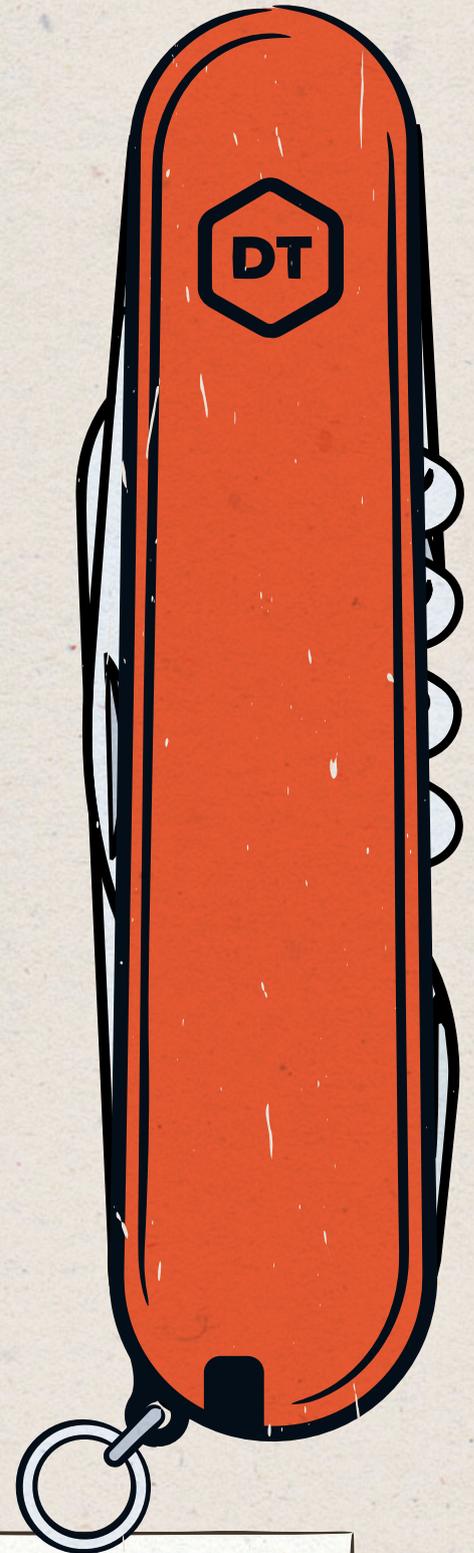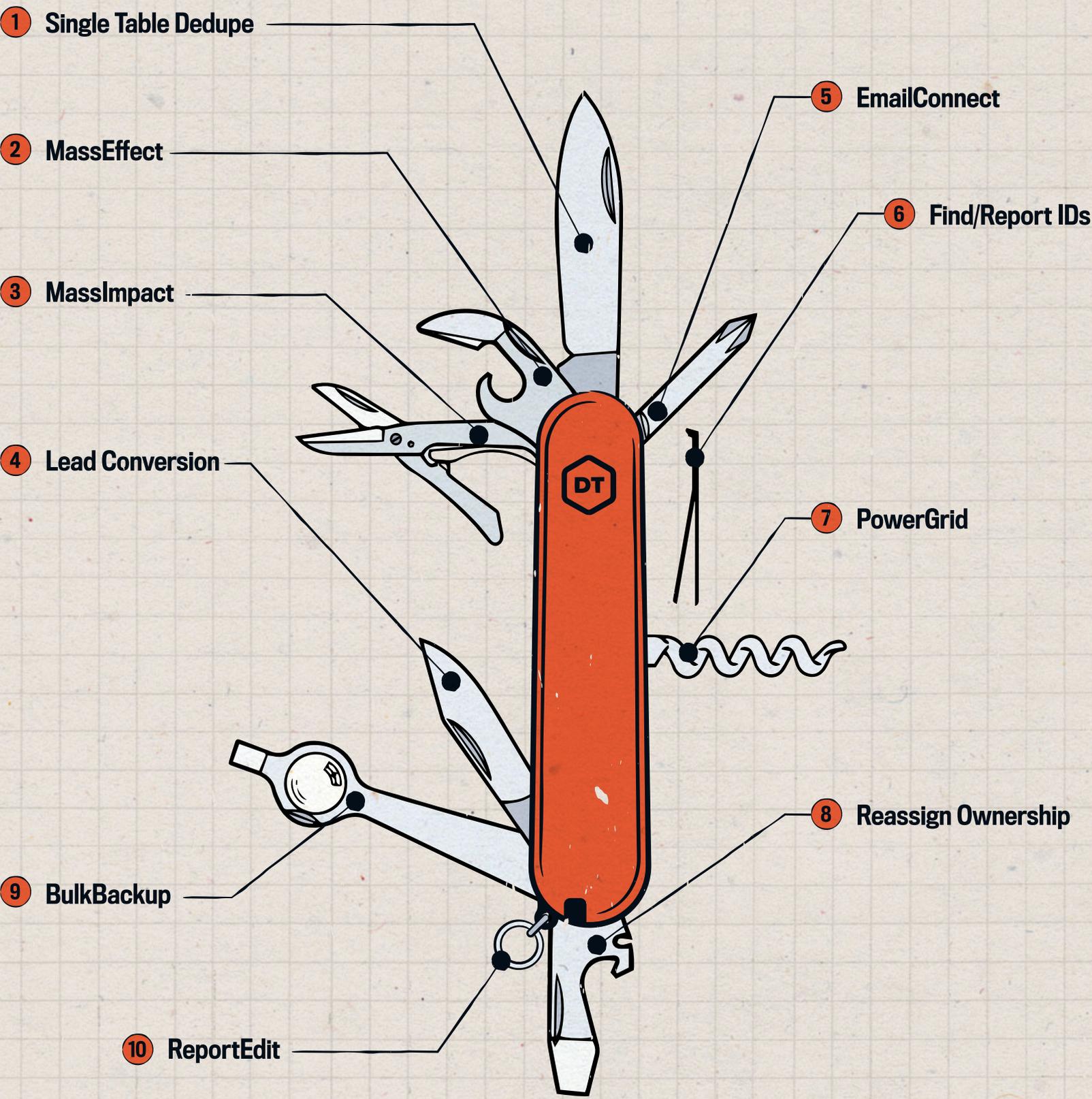
> *"I can do so much more with DemandTools. It is my toolbelt. Given the comprehensive toolset provided by DemandTools, it's as easy as, 'do I need a wrench, a hammer or a drill?'"*
>
> **- Karen Hayum**, an experienced Salesforce administrator who uses DemandTools to help companies achieve cleaner data and improve lead management.

GUIDANCE

A "SWISS ARMY KNIFE" FOR TODAY'S DATA MANAGERS

1. Single Table Dedupe
2. MassEffect
3. MassImpact
4. Lead Conversion
5. EmailConnect
6. Find/Report IDs
7. PowerGrid
8. Reassign Ownership
9. BulkBackup
10. ReportEdit

THE DATA MANAGER'S FIELD GUIDE
A "SWISS ARMY KNIFE" FOR TODAY'S DATA MANAGERS

CUT HERE

SINGLE TABLE DEDUPE

The large knife blade is probably the single most frequently used of all Swiss Army knife tools, simply because the need to cut something is so common—from opening a package to cutting a length of twine. Similarly, Single Table Dedupe is one of the most powerful and popular tools in the DemandTools suite, because it addresses one of the most common and devastating of all CRM data issues: duplicate records.

CRM systems were created to give businesses a single view of each customer, all in one location. Duplicate records defeat this essential purpose—and unfortunately, duplicates are an inevitable issue that data managers deal with on a daily basis.

What's more, the headaches created by duplicates affect departments throughout the organization, and can severely impact revenue generation. For example, marketing spend is often based on database size. If the database is bloated with redundant contacts and duplicate leads, the marketing budget may be unnecessarily inflated. Duplicates also create concerns about account ownership among the sales team, as multiple salespeople may inadvertently target and contact the same lead. Sales and marketing forecasts are often skewed by duplicate records.

SEEING DOUBLE

Duplicate data wastes marketing spend, skews forecasts, and frustrates users. Stop seeing double and start getting a true single view of your customers.

Single Table Dedupe is a powerhouse deduplicator that solves the duplicate problem by finding and merging duplicate records in data sets of any size. It was the first customizable, mass deduplicator to allow merging of both standard *and* custom objects within Salesforce, with custom master rules and custom field rules. With 20 robust matching algorithms to find duplicates based on any data type, its settings allow the user to specify which duplicate record is retained and which field values are kept from each record.

Common use cases for Single Table Dedupe include:

Routine duplicate management.

If there's one task that data managers must complete effectively, it's managing duplicates. So it's no surprise that the single most common use case for Single Table Dedupe is routine deduplication using a series of matching techniques.

Checking for post-import duplicates.

New data imports commonly create duplicate records. Following a data import, Single Table Dedupe can be set to return only matches where at least one of the duplicate records was created today.

Establishing field rules.

Single Table Dedupe can help to ensure alignment across different departments and establish a single source of truth. Using Single Table Dedupe, a data manager can export duplicates into a file that can be shared with others, regardless of whether they have access to DemandTools. This can be especially useful when the data manager needs to document the process for handling merges, or when managing duplicates requires input from other teams to determine which record should be kept as the master. Field rules allow each department to weigh in on how data is handled, especially the data fields they rely on most. Because each stakeholder has a say in the data handling, data quality remains at the forefront for each department.

Effective merging of contacts and leads.

Sometimes it's important to retain the email addresses and phone numbers for all the records within a duplicate group. For example, if you merge data from a trade show with your CRM, you may be adding email addresses for new contacts within an existing target account. This provides new contact opportunities within that company for sales and marketing campaigns. You may also find that a cold contact now has a new email address, which may reopen the door for engaging with that prospect.

Accurate tracking of merged records.

Users often want to know how many of their records have been processed as duplicates. Salesforce has the capability to track merged records as part of the record history, but it's difficult to get a clean report. Single Table Dedupe accurately tracks the duplicates that have been eliminated and provides an easier way to track down data if something seems "off" after a merge.

As an added benefit, Single Table Dedupe can help to restore confidence in CRM data and boost user adoption of the CRM by addressing the single most critical data quality issue. Its powerful deduplication abilities establish a baseline level of trust in the validity and uniqueness of each data record, and help to assure data users that their efforts aren't going to waste as a result of duplicates.

GUIDANCE

An admin for a leading global provider of commercial data and analytics used Single Table Dedupe to fix issues created during a data migration and help restore confidence in the CRM data.

READ THE CASE STUDY HERE

THE CAN OPENER
MASSEFFECT

Versatile and functional, the can opener is among the go-to tools of the Swiss Army knife. MassEffect occupies a similar position within the DemandTools suite, serving as an all-in-one ETL (extract, transform, load) tool to help data managers import, update, upsert, delete, undelete, and export data.

Often, the data that data managers are given to work with doesn't follow established formatting protocols and has to be "massaged" before it can be migrated into the CRM. Different file types, non-standardized data, and inconsistent data fields create headaches for data managers and slow down the data mapping process. When this work has to be executed manually, manipulations are typically done within the original spreadsheet—creating more potential for human error and rework.

CRITICAL MASS

This all-in-one ETL tool puts more of the heavy lifting on the solution, not the Salesforce admin. It features built-in standardization and support for international characters, advanced file formats, and more.

MassEffect is designed to optimize data migrations, manage the overall CRM import process, and give the user control over the data *without* manipulating the spreadsheet—so data is not only imported to the CRM, it's imported cleanly and efficiently. With MassEffect, you can apply standardization formulas to the data as it enters the CRM, rather than changing it in the spreadsheet prior to upload. If all records are intended to have the same value for a given field, you can add that value as a constant—again, without manipulating the spreadsheet.

The tool is optimized to leverage multiple file types, process hundreds of thousands of records, and automate portions of the workflow to take more of the burden off the user.

Common use cases for MassEffect include:

Data import from list purchases.

When it comes to purchased or rented lists, consistency is not part of the package. With MassEffect, you can ensure that records are standardized before they're migrated into your CRM. And the drag-and-drop interface and ability to save field mappings makes it easy to map fields, so data can be imported cleanly and efficiently.

Upserts from non-integrated systems.

Bringing in data from disparate systems can be a nightmare—especially when those systems don't integrate directly with your CRM. But MassEffect helps keep data clean and properly connected when moving data from one system to another so you don't end up with a mess of duplicate and conflicting records. Upserts use one key field to show where records match or are new. This allows data managers to import and update without dumping in data as if it's new when it isn't. This helps with migrations because there is typically one unique identifier (either an External ID field or the Salesforce ID) used in both systems that can be used to keep the data connected. Additionally, MassEffect displays field attributes, such as if a field is required and the permitted character length. This lets data managers quickly recall and meet field level settings as data is imported or updated, and avoid errors that prevent the data from being processed.

Adding campaign members to a campaign.

Creating Leads and Contacts as campaign members through the campaign member table makes campaign assignment easy and helps ensure proper attribution.

Streamlined data exports.

MassEffect includes built-in export functionality, allowing you to export decoded documents (it exports the actual file) instead of first creating a Salesforce report and then exporting that report. Additionally, the Salesforce ID will automatically be included with every record you export. This is important because ensuring the Salesforce ID is there means there is always a way to uniquely identify the record in the spreadsheet in Salesforce.

Combined with other tools in the DemandTools suite, MassEffect provides a complete and powerful solution for data import, export, and manipulation. We understand how to expedite the data manager's processes because we asked—and our end users provided feedback on the tool's design, features, and functionality. Simply put, the DemandTools suite is designed to do more of the work for you, in a way that supports the unique needs and processes of each organization.
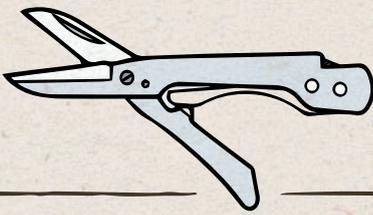
GUIDANCE

"In terms of productivity, I'm easily shaving off 80 to 90 percent of the manual work that would need to be done without these tools."

- Gerry Marletta - Director of Technology Operations at Argyle Executive Forum.

READ THE CASE STUDY HERE

THE SCISSORS

3

MASSIMPACT

The scissors are an enduring part of any standard Swiss Army knife because they're useful in so many situations that require more precision and control than a blade—like snipping a wire, trimming a loose thread, or cutting a zip tie. In the same way, the MassImpact module in the DemandTools suite provides a seemingly simple functionality that can be applied in countless ways: standardization capabilities for overall data maintenance.

Nonstandardized data makes it difficult for CRM users to conduct useful searches, get accurate list views, or make data-based decisions. For example, imagine you want to see all records where the state is "Tennessee," but the state field includes entries in a variety of formats like TN, Tenn, and Tennessee. Clearly, it will be difficult to get accurate search results.

CONSISTENTLY BETTER

Inconsistent data impacts search results, object counts, and more. Ensure consistency. Modify thousands of existing records at once using custom or out-of-the-box formulas.

MassImpact eliminates this problem by allowing you to query CRM records on any object and mass-modify fields, based on out-of-the box formulas or custom standardization values you specify. You can standardize multiple fields simultaneously, and run the process several times a day to ensure consistently high data quality. It's even possible to automate the standardization process with JobBuilder (discussed later in this guide), making MassImpact an instant time saver.

MassImpact is also commonly used for object counts and field sums to help analyze and segment data, leading to more personalized interactions with customers and prospects. For example, you could run a search to find out how many accounts have logged five or more help tickets in a quarter, as a way of identifying opportunities for additional training and tutorial-based outreach.

Common use cases for MassImpact include:

Standardization of state, country, and phone fields.

This is typically done using one of MassImpact's 19 pre-built scenarios, which include two standard formats for states/provinces and three standard formats for countries. This allows users to standardize on either the long or short form of the state/province name and an ISO standard for country names.

Standardization of job titles.

It's difficult to pull complete records of all sales managers in your contact list if the title field includes variations like "Sales Manager" and "Sales Mgr." MassImpact allows you to standardize on a specific format for job titles, providing far more accurate search results.

Although these are the most common uses for MassImpact, the possibilities are truly endless. Some of the most common examples we've heard include:

- **Finding all closed won opportunities for the year and changing the account type field to "Customer"**

- **Counting the number of opportunities created on each account this year**

- **Copying the account number from the account record onto each associated contact record**

- **Finding out the total number of marketing touches per contact during a given time period**

- **Running field sums on closed won opportunities to identify and target new loyalty members in the retail and hospitality verticals**

MassImpact is a favorite among data managers because it allows them to give their data the daily tune-up and attention it requires. And since automating this process is so easy, regular data maintenance can take place behind the scenes, without manual intervention. MassImpact can also help to boost user adoption of the CRM by making data more consistent and easier to work with.

GUIDANCE

"The applications of DemandTools are endless. We are astounded at the sheer power and usefulness of this tool in making our processes and data cleaner, more manageable, and completely reliable."

- Trisha B.

THE SMALL BLADE

4
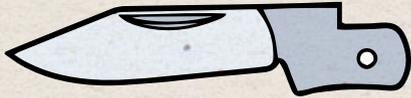
LEAD CONVERSION

Although it might seem redundant to have two blades in a single Swiss Army Knife, there's actually a good reason for including both. The large blade typically receives heavy use, so it can become dull over time. Having a second blade in reserve ensures a razor-sharp knife will always be available for highly specialized jobs.

Similarly, the Lead Conversion module is a lead management and deduplication tool within DemandTools. Although Single Table Dedupe (discussed earlier in this guide) performs deduplication for an entire database, Lead Conversion does it in a more specific context, by ensuring that your leads are not duplicates of existing contacts.

The primary use case for Lead Conversion is lead deduplication and conversion.

Because leads come in from multiple sources over time, new leads are often really new contacts at an organization you already have an existing relationship with. This can create confusion among sales and marketing teams, as it can be difficult to distinguish between new prospects, mid-funnel leads, and existing customers. This module compares leads against accounts to show where those relationships exist, so the leads can be routed to the correct owner and nurtured appropriately.

TAKE THE LEAD

When you prevent duplicate leads and route leads correctly and efficiently, you can speed follow-up and nurturing, and improve conversion rates.

The Lead Conversion tool is a necessary part of a complete deduplication approach, and it provides functionality that isn't available in the native Salesforce environment.* Although Salesforce provides some lead-to-contact and lead-to account comparison, it can't be done in bulk and doesn't allow for custom matching.

By ensuring unique and accurate lead lists with Lead Conversion, you can be confident that every customer and prospect will have the experience you intend as they engage with your organization. New leads won't have the disjointed experience of being contacted by multiple sales reps, and loyal customers will never be treated as new prospects.

> ** Note: Lead Conversion can only be used by organizations that utilize the lead object in Salesforce.*

GUIDANCE

"I do not know how anyone can manage their data without DemandTools... It's essential to strategically sound data."

- Annette A.

THE SCREWDRIVER

EMAILCONNECT

The genius of the Phillips head screwdriver lies in its ability to self-center, ensuring correct alignment every time. Although it may not be used as frequently as the other screwdrivers in the Swiss Army knife, it's a uniquely useful and important tool to have.

STAY CONNECTED

Identify invalid emails within your CRM that prevent teams like marketing, sales, and customer service from engaging with contacts and leads.

As the newest addition to the DemandTools suite, EmailConnect ensures correct alignment between your brand and its contacts by providing mass verification of email addresses within your CRM. Powered by BriteVerify, EmailConnect ensures the quality of your CRM data by ensuring that every email address is accurate and valid.

Common use cases for EmailConnect include:

- Email verification prior to the launch of a marketing campaign

- Email verification after loading a new list of leads

- Email verification to ensure sales and support can nurture the relationship and provide timely information related to products and service

Eliminating invalid email addresses from your CRM can help to limit the number of "bad" addresses that are targeted by your marketing campaigns, and provide more accurate performance metrics. It also helps to enhance the customer relationship by ensuring that contacts are receiving the important information they need from your sales and service teams.

Managing this process directly within the DemandTools solution saves time and improves efficiency, as it helps to ensure data integrity and usability without the need for yet another tool.

GUIDANCE

"I can't image trying to do half the data cleanup or data management we do without DemandTools... it's an integral part of our data strategy and toolkit. Makes mass updates, deduplication, and data normalization so much easier. Love it."

- Ryan G.

THE TWEEZERS

6

FIND/REPORT IDs

The tweezers are among the most overlooked tools in any Swiss Army knife. But talk to someone who's picked up a splinter in the wilderness, and you'll know this lesser known tool can be a lifesaver.

In the same way, the Find/Report IDs module in DemandTools can be an absolutely critical tool for data managers in situations where they need to find the connection (if one exists) between data in their spreadsheet and data in Salesforce. It allows users to compare records from the spreadsheet to records in Salesforce, then return and export field-specific results if one or more matches exist.

Common use cases for Find/Report IDs include:

Pre-import comparison for standard and custom objects.

Cleanly move data into Salesforce from another system or combine Salesforce instances (as in the case of an acquisition).

Eliminating the need for VLOOKUPs in Excel.

While VLOOKUP is a powerful Excel function, it takes some time to master. Additionally, VLOOKUP is not case sensitive, which is critical when comparing on Salesforce IDs that are case sensitive. Find/Report IDs allows you to take a subset of data and compare it against the rest of your data in minutes.

Reducing rework from data exports and manipulation.

Who hasn't experienced this? You export data from your CRM to a spreadsheet, then start manipulating the data and maybe remove a few records—only to realize you forgot to pull a field or two of data during the export. Instead of starting from scratch, Find/Report IDs allows you to compare the spreadsheet data to the CRM data and return the desired fields when a match is found.

Finding field level data from incomplete records.

When a user finds themselves with a list of names or account IDs with no other data, Find/Report IDs makes it possible to get field level data for these accounts out of the CRM, as well as a list of all contacts under each account.

Maintaining high-quality CRM data requires pre-processing tools like Find/Report IDs to identify relationships between data quickly and easily. Data comes from many different sources, and using a tool like Find/Report IDs can help to manage external data properly as it enters the CRM.

MATCH MADE

Data comes from multiple sources. Easily look for the connection between data in your spreadsheet and data in your CRM and reduce rework from data exports and manipulation.

THE CORKSCREW

7

POWERGRID

Whether it's part of a Swiss Army knife or a standalone tool, the simplicity and utility of a manual corkscrew is a thing of beauty. Sure, there are other ways to remove the cork from the neck of a bottle, but the corkscrew is undeniably the right tool for the job.

When it comes to data management and quality assurance, there are inevitably situations where things need to be done manually. For those times, the PowerGrid module in DemandTools is the right solution for the job.

PowerGrid presents data in a spreadsheet-style workspace that allows for modifications without requiring data to be exported and reimported. It allows you to work with subsets of data and make changes either to individual records or en masse. It also includes specialized filters that help to identify and purge junk data, as well as ad hoc deduplication functionality.

Common use cases for PowerGrid include:

- Modifying "unruly" data that doesn't fit logically within "find and fix" query

- Helping new users to understand how changes made to data via the API are translated back into the CRM

- Addressing user-requested changes and other issues related to specific records

BE EMPOWERED

Modify data record-by-record or apply changes to an entire data set in a grid-based view of your data that also supports merging and helps identify and purge junk data.

Because PowerGrid allows you to manage data inside the CRM data center, without the need for exporting and reimporting, it reduces data security concerns and makes it easier to comply with new data handling requirements. Quite simply, PowerGrid is the easiest way to find and eliminate junk data that doesn't fit a standard query, make manual changes to individual or bulk records, and maintain the security of your data set.
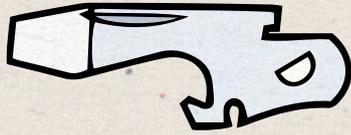
GUIDANCE

"I rarely write reviews, but DemandTools has become such a critical part of my daily life in Salesforce, that I really cannot imagine what I would do without it."

- Erik N.

THE BOTTLE OPENER

⑧ # REASSIGN OWNERSHIP

The bottle opener on a Swiss Army knife is a useful tool on its own, but it's also much more than meets the eye. Because built into the bottle opener are two additional tools–a flat head screwdriver and a wire stripper–which take this implement to a whole other level.

In the same way, the Reassign Ownership module in the DemandTools suite takes the everyday task of record reassignment to another level. With this tool, users can do simple reassignments (e.g., take records owned by X and reassign to Y), or reassign based on logic statements and territory definitions. Related records can also be reassigned as part of the same process–for example, reassigning not only contacts, but also associated open cases and open opportunities. It's also important to note that reassignments can be quickly and accurately reversed, if needed.

Common use cases for Reassign Ownership include:

Territory reassignments.

When someone leaves the company or changes territories, Reassign Ownership can be used to reassign their accounts and all related, relevant object records in one process.

Ownership alignment.

In organizations that dictate all sub-object records must be owned by the account owner, this tool makes it possible to assign all child records to the parent object owner, all within the same process.

OWN IT

Getting a clear picture of account ownership clarifies responsibility and helps sales managers generate accurate pipeline projections and territory reports.

Ensuring proper assignment of each record provides a clear picture of account ownership across the organization, and eliminates confusion about who's responsible for what. In addition, sales managers can use this information to generate accurate, reliable pipeline projections and territory reports.
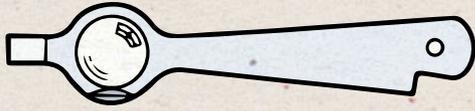
GUIDANCE

"DemandTools is such a wonderful tool. It saves me so much time. I've migrated over 10 different databases into Salesforce using this tool and I can't imagine what I would have done without it."

- Diane H.

THE MAGNIFYING GLASS

9

BULKBACKUP

The magnifying glass is a very specialized tool compared to other Swiss Army knife components. But when you need to get a closer look, there's simply no other tool that can do the job.

The BulkBackup module in DemandTools plays a similarly unique role for data managers, providing unlimited, on-demand backup of CRM data. It ensures that users always have a current backup as they're manipulating data–so changes can easily be reversed if something goes wrong.

ON GUARD

Protect your data. Back up as much of your data as you want, as often as you want so you can reverse changes if something goes wrong.

Common use cases for BulkBackup include:

- **Backups of the entire database**

- **Backups of selected objects within the database**

BulkBackup allows users to copy their data whenever they need to, as often as they need to–thus preserving the data quality achieved with DemandTools. It also goes beyond the built-in value of native Salesforce tools, as Salesforce only provides backup capabilities at a premium (there are some manual backup options in Salesforce, but Salesforce plans to retire its data backup recovery service July 31, 2020).

Including BulkBackup in the DemandTools suite gives data managers more control over their data and backup procedures, while reducing total spend. This can be especially important for smaller businesses and those with limited resources for data management. An all-in-one solution like DemandTools helps organizations to ensure proper data management and high-quality data without overtaxing their technology budget or adding one-off tools.
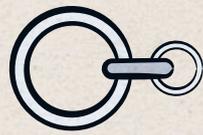
GUIDANCE

"Shhh, don't tell my boss but this tool just cut my workload in half. I have more time to examine different processes and projects now. I love this tool."

- Tamara B.

THE KEY RING
REPORTEDIT

The Swiss Army knife's keyring is used to manage keys and other small items that might otherwise get lost, keeping them organized and readily accessible. The ReportEdit module in the DemandTools suite plays a comparable role, allowing users to organize and manage Salesforce reports in bulk.

This tool makes it possible to quickly reorganize reports into the correct folders, change report names and descriptions, and remove old, outdated reports from the CRM. It displays pertinent information for each report, like most recent run date, which helps to ensure that outdated reports can be easily identified and purged.

CLEAN SWEEP

Make it easier to find relevant data by removing old reports from the system and the obstacles outdated information can create.

The typical use case for ReportEdit is quarterly or semiannual CRM clean-up, when users dedicate time to purging old reports, reorganizing report folders, and updating report descriptions. Without ReportEdit, this task is only possible as a manual, one-at-a-time process, which is both frustrating and time consuming—and tends to be neglected by all but the most diligent organizations.

Eliminating old reports from the system ensures they will never be used as the basis for sales forecasts, campaigns, or other critical business decisions. It also makes it easier to find reports that are truly relevant by cutting down on the "clutter" of outdated information.

BRING IT ALL TOGETHER WITH JOBBUILDER

While JobBuilder isn't a module within the DemandTools suite, it's an incredibly powerful companion application that can be used to automate DemandTools data quality processes within Salesforce. JobBuilder was created to amplify the value of DemandTools, but that's not all it does.

SAVE TIME

Automate data quality processes and keep your data clean. Users who implement JobBuilder with DemandTools have reported saving up to 10 hours per week!

JobBuilder allows data managers to automate many cyclical data quality processes by establishing routine jobs and customizing various options. The result is a more streamlined, efficient administrative process that saves both admin time and system resources. In fact, JobBuilder has been found to save admins up to 10 hours per week in tedious manual tasks.

While JobBuilder is fully compatible with DemandTools, it is also a complete automation tool that can be used to automate processes outside the DemandTools suite. For example, you can automatically send an email notifying the right people after the weekly dedupe scenarios have been run.

The only DemandTools module that doesn't work in conjunction with JobBuilder is PowerGrid—which makes sense, as we explained earlier that PowerGrid is a tool for simplifying *manual* data management. All other DemandTools modules can be scheduled through JobBuilder, making the day-to-day life of a Salesforce admin that much easier.

4 ADVANTAGES OVER NATIVE SALESFORCE TOOLS

The DemandTools Suite provides additional value over and above what the native Salesforce tools can offer.

Here are four examples:

Merging Capabilities

The Salesforce merge utility cannot be automated, it can't merge custom objects, it can only merge three records at a time. The DemandTools suite solves all these deficiencies, and provides record level backups–while the native Salesforce tool doesn't provide any backup data related to the merge.

Duplicate Prevention

With the recent addition of DupeBlocker to the DemandTools suite, duplicates are prevented proactively at the source to automatically protect your data quality. While duplicate management is available in Salesforce, the solution is not as robust as what you'll find with the DemandTools suite. For example, our solution can auto merge data based on saved user defined rules, not just block duplicates. Auto merging allows the duplicate into Salesforce and then uses the pre-set rules to ensure that any new data coming in on the duplicate record is retained properly. This provides data managers with a more complete and controllable way to handle duplicate data.

Mass-Merge Duplicates

Integrations available within Single Table Dedupe allow users to mass-merge duplicates reported by DupeBlocker, and capture lower-confidence duplicates so they can be reviewed manually.

Powerful Imports

Another recent addition to the DemandTools suite is PeopleImport. This powerful solution will be especially useful for those tasked with both managing marketing data and marketing in general. It's also an essential tool for streamlining the import process. With PeopleImport, you can keep your Salesforce database clean as you continually add Contacts and Leads from tradeshow lists, marketing campaigns, or other lead generation activities. PeopleImport allows you to: import new and update existing Leads, Contacts, and Accounts at the same time; perform multiple custom comparisons between incoming data and existing Salesforce data in a single process, and assign tasks for proper follow-up as new Leads and Contacts are added to campaigns.

NAVIGATE EVERYDAY PERILS AND UNEXPECTED PITFALLS WITH DEMANDTOOLS

Data managers are in a constant battle to maintain clean, high-quality CRM data that can be trusted for sales forecasting, marketing campaigns, and other strategic business initiatives. Every day, they face challenges like duplicate records, non-standardized data, and unverified records that threaten to derail their efforts.

DemandTools is the ultimate all-in-one tool to help in this fight. From top to bottom, its specialized modules help to establish and maintain the highest quality CRM data, while removing complexities that can bog down even the most efficient data managers. And with functionality to identify, remove, and even prevent poor quality data from entering your system, DemandTools is the single powerhouse data management solution you need to ensure your data is the reliable, versatile asset you need it to be.

For more information about DemandTools and its "Swiss Army knife" of data management modules, you can download the product guide or schedule a demo. You can also see all of DemandTools' modules in action for yourself by signing up for a free 30-day trial of DemandTools here. Once you've signed up for your trial, you will have the opportunity to create an account that gives you instant access to DemandTools training materials, help docs, and other DemandTools users.

▼ validity

Businesses run better and grow faster with trustworthy data. Tens of thousands of organizations rely on Validity solutions - including DemandTools, BriteVerify, Trust Assessments, Return Path, 250ok and GridBuddy - to target, contact, engage, and retain customers effectively. Marketing, sales, and customer success teams worldwide trust Validity solutions to help them create smarter campaigns, generate leads, drive response, and increase revenue.

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