The University of Arizona Modifies 1.1 Million Records in One Month with Validity DemandTools.

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The challenge:

Cleaning and maintaining data quality for records across campus to connect students with the support and services they need to succeed.

Across the University of Arizona, current students, staff, external partners, Human Resources, student service offices including Bursar, Financial Aid, and Registrar rely on the data in Salesforce. Salesforce is the University engagement platform, and Validity DemandTools is a key data management/data quality tool.

Student success is a priority for the University. In order to best support them, the University is working facilitate a student's path through student services, ensuring each campus organization is ready to assist their unique needs. For example, a student might begin their journey at their academic advisor's office, where they learn about a study abroad program in their major, then check into the office of Study Abroad to find out about the program specifics, and finally stop at the Financial Aid office for information about the monetary aspect of studying abroad. When they arrive, the Office of Financial Aid will be able to better help a student by understanding their full journey.

When Lead Data Strategist Frances Miller first joined the University as a research analyst, she quickly discovered the opportunity for systematic data quality improvement. Different types of accounts were housed under the same name, and students frequently were part of multiple lists using variations of their names. With 50,000 new records regularly being added to the database at once and the challenge of migrating multiple campus communication streams into Salesforce, the team needed a new approach. Miller moved into a data management role and began looking for data quality solutions to combat these inconsistencies and expand their list import functionality.

At the University, Salesforce is the sole method by which students can make appointments with their academic advisors. If a certain student had multiple records in Salesforce, they could be locked out of their appointment-booking feature. Duplicates

also prevented the University staff from successfully logging cases for students visiting the various services and organizations on campus, forcing students to rehash their problems multiple times at each location. Without quality data, the students may have a more difficult time getting the support they need from their advisors or the rest of the student services departments on campus.

With these challenges in mind, Miller started with out-of-the-box Salesforce tools like Data Loader and Import Wizard. Unfortunately, these tools couldn't provide the importing flexibility she needed. She needed a more comprehensive solution. She tried employing a third-party deduplication solution, but unfortunately, it could only clean duplicates after they entered the system rather than denying duplicates entry in the first place. Miller needed a new approach.

Enter Validity DemandTools.

The solution:

Ongoing data cleaning and duplicate prevention from Validity DemandTools.

One of Miller's Salesforce consultants recommended Validity DemandTools to help with their data management challenges. With the variety of records Miller's team manages, DemandTools was crucial in helping create the necessary import and duplicate rules for data quality.

Miller and her team got to work right away using the Dedupe module to clean their existing data. This was instrumental in finding duplicates created by people signing up for various campus email lists with different accounts. "At one point, the president of the University ended up with seven or eight records in our system," Miller said, demonstrating the ease with which duplicates are created.

The Dupeblocker module comes in handy for Miller and her team to catch duplicates at the source, denying them entry into their database. This saves their team time and helps them maintain the data quality they worked so hard to achieve.

And for any students who slip through with a nickname or other name variation? Miller and her team can confidently merge records without worrying about the downstream effects.

On top of managing duplicates, Miller and her team must be conscious of data storage. The University uses Salesforce Marketing Cloud to communicate with the University's

network for transactional and commercial emails with over 17.6 million emails sent this fiscal year. This scale posed a threat to Salesforce data storage limits with individual email result records being created after each massive send. The Delete module helps Miller easily remove the individual email results records created after campus-wide Salesforce Marketing Cloud sends once they are past a certain age, allowing them to keep the data when they need it and dispose of it quickly to free up storage.

The results:

A clean, actionable, database with the ability to delegate cleansing tasks for efficient management.

After implementing DemandTools into their data management process, Miller and her team reaped the benefits of efficient data management. In one month, they modified 1.1 million records, merged 21,000 records, inserted 16,000 records, and updated 205,000 records. These numbers could only be achieved with a multi-year project for the average CRM team.

DemandTools was developed in a way that allows data management responsibilities to be shared while maintaining consistency and alignment through overarching controls. Now, teams don't have to deal with bottlenecks or inconsistencies slowing them down. "We never want to dissuade a student from getting the help they need because of a technical issue. This is a place where DemandTools really comes in handy," Miller said.

Miller and her team are thrilled to see the major improvements to their process. "If I had been able to set up these scenarios and expectations for data quality before things got out of hand, it would've saved a lot of time and helped us not have to rebuild the trust of the data," said Miller. "Having DemandTools at the beginning to be successful in not just the data quality realm, but in the user experience realm, would've been a good investment."

What's next for the University of Arizona? They're supplementing DemandTools with Validity BriteVerify to validate their massive email lists and continue supporting students while honing their internal processes.

"You can probably tell... but I really am a DemandTools evangelist."— Frances Miller, Lead Data Strategist, University of Arizona.

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