cloudingo × Salesforce Ben

THE AI-READY CRM

Your AI Readiness Checklist

Build the data foundation AI needs to deliver results.

KEY INSIGHT

Readiness — not awareness — is the blocker.

You don't need a 6-month data project. Focus on foundational operational problems first and let AI make inroads where and when it makes sense. **Start with one object, one week** and work through these key areas.

01 FOUNDATION — Review your data model

Structure determines the quality of everything that follows — including AI outputs.

- [ ] Run a field analysis for usage and completeness.
- [ ] Make key fields required and/or dependent when relevant.
- [ ] Review picklist values for consolidation and simplification.
- [ ] Review user permissions to control who can make changes.
- [ ] Consolidate fields to eliminate scattered data and inconsistencies.
- [ ] Convert fields to picklists and Boolean fields where possible to ensure consistency.
- [ ] Review integrations and data insert process to ensure data lands in the right places.
- [ ] Understand how your data is used today and how AI tools will be incorporated into your operations.

02 AI READINESS — Review your data quality

Clean, consistent data is the fuel AI needs — garbage in, garbage out.

- [ ] Run a duplicate report across all key objects.
- [ ] Validate and standardize key data points (phone, address, email, website).
- [ ] Update related records for consistency (ownership, addresses, etc.).
- [ ] Where possible, append and enrich records with missing data points.
- [ ] Delete or archive old, unneeded, and ineffective records.
- [ ] Update ownership to active users.
- [ ] Correct or eliminate filler, test, and placeholder data.
- [ ] Update inactive picklist values to active values.

03 ONGOING GOVERNANCE — Establish ongoing policies and procedures

AI reliability is sustained by continuous data governance, not a one-time cleanup.

- [ ] Schedule data quality processes to run on meaningful intervals.
- [ ] Frequently review data quality status with a data quality dashboard report.
- [ ] Regularly review how AI tools are being used in your organization and what data they rely on to generate outputs.
- [ ] Re-analyze and define what "good data" means in your operations at least annually.
- [ ] Conduct regular reviews of the data model to ensure ongoing alignment with operational needs (monthly, quarterly, or at least annually).

How Cloudingo helps you get there

Find and merge duplicates, standardize fields, and keep Salesforce clean on a schedule.

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