

BUILD THE CASE

Building the case for data quality

If you're building the internal case for a Salesforce data quality investment, the questions below are worth sitting with before you walk into that meeting. You don't need to obsess over every one of these to get real value from a data quality tool — but it helps.

01

SECTION ONE

What is bad data actually costing you?

The true cost rarely shows up in a report. It shows up in what your team stopped doing or started doing outside the system.

- ☐ Do you know if reps have built their own tracking outside Salesforce?
- ☐ Is your team pulling data out of the CRM to do their own reporting?
Spreadsheets, pivot tables, their own exports — anything that signals they don't trust the system.
- ☐ Are there manual processes your team runs every week because the data can't be relied on?
Think: list scrubbing before a send, ownership audits before a campaign, deduplication before an import.
- ☐ Has Salesforce adoption dropped — or stalled — among any team or role?

02

SECTION TWO

Where is it bleeding into your tech stack?

Check the tools in your stack. For each one, ask: do we know how duplicate or dirty data is affecting this?



Marketing automation

Bad targeting, attribution, personalization

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Sales engagement

Double touches, missed personalization

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Enrichment / intent

Wasted spend, diluted insight

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Lead routing

Lost leads, ownership issues

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Reporting

Misleading metrics, broken trust

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Data integration

Cross-system chaos, duplicated logic

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Customer support

Missed context, poor ticket routing

☐

03

SECTION THREE

Are you ready for the internal conversation?

These are the questions your leadership will ask. Better to have the answers ready.

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Who owns this problem today — and do they have the authority to fix it?

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What does one wasted hour per person per day add up to across your team, per week?

You don't need a precise number. A rough one is enough to make the case.

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What would need to be true for leadership to see this as a priority?

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Six months from now, what does a win look like — and will you be able to measure it?

If you can answer most of these, you don't need to sell this internally. The case makes itself.

Need help thinking it through?

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