

Plauti  
Presents

Scale Faster  
**THROUGH DATA  
QUALITY EXCELLENCE**



Make the most of your scaling processes in the  
data driven world.



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# Scale Faster Through Data Quality Excellence

Make the most of your scaling processes in the data driven world.



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Welcome to Plauti's practical guide "Scale Faster through Data Quality Excellence". This e-book was created to help equip you with the knowledge and tools needed to make the most of your scaling processes in the data driven world. No matter what stage of growth your business is in, it's crucial to have a plan to scale effectively and do so by using the most accurate and valuable data throughout the entire information cycle.

This e-book is divided in seven chapters and concludes with a case study:

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# Introduction

Scaling an organization's technology stack is no easy feat. As businesses grow and evolve, so do their technological needs, and it's crucial to have a solid foundation that can support expansion and innovation. In today's fast-paced digital landscape, organizations that fail to keep up with the latest trends and advancements risk falling behind the competition. However, implementing new technologies and scaling a technology stack comes with its own unique set of challenges, such as navigating complex integrations, managing data security, and ensuring compatibility with existing systems.

This e-book aims to provide a guide to help organizations navigate the various themes and topics when it comes to scaling their technology stack, from analyzing current infrastructure and identifying areas for improvement to implementing new technologies and optimizing processes for long-term success.

This e-book also sets out to highlight the needs and benefits of data quality within the scope of a technology stack. As data becomes more abundant, managing and finding meaning in the endless sea of data becomes more challenging and complex. The ramifications of poor data within a company's records is a growing subject with more light being shed on the issue in recent years.




According to a [survey](#) by research firm Gartner, "organizations believe poor data quality to be responsible for an average of \$15 million per year in losses." Gartner also found that nearly 60% of those surveyed didn't know how much bad data costs their businesses because they don't measure it in the first place".

The most interesting revelation here is the fact that most companies are not even aware of the cost of poor data. Of course, when one actually realizes the cost of poor data, the need to improve it becomes a priority very quickly. In another example, a recent [study](#) from Salesforce, which found that "poor quality data costs businesses around \$700 billion a year, or 30 percent of the average company's revenue".



# Part One: Technology Stack



A term you come across quite often is “tech stack” or “technology stack”. But, what exactly is it? Put simply, a tech stack is a set of software tools used by a company to develop, implement, and manage its applications, services, and infrastructure. The term can be applied in various ways, such as front-end technology stacks, hardware technology stacks, and more. However, in all technology stacks, the various layers should be designed to work together to create a cohesive and efficient technology infrastructure that can support a company's daily operations, such as communication between teams, emailing customers, keeping track of sales metrics, and more.

The term “technology stack” can be further divided into specific areas of a business. For instance, a marketing tech stack is a collection of different software tools and technologies used by a company's marketing team to manage and automate various processes.



A fully-fledged marketing tech stack would usually include a combination of the following:

### Customer Relationship Management (CRM) Software



A CRM (Customer Relationship Management) system is used to manage and analyze interactions with customers and potential customers. It is the foundation of the stack as it allows businesses to store and organize customer data, track customer interactions across multiple channels, and provide insights into customer behavior and preferences.



### Marketing Automation Software

Marketing automation software is a key component of a marketing tech stack and allows the modern marketer to automate many manual tasks, such as emailing you a discount voucher on your birthday.

### Social Media Management Tools



These software applications help businesses manage their social media presence across different platforms, such as Facebook, Twitter, LinkedIn, Instagram, and others. These tools are designed to simplify the process of creating, publishing, and, very importantly, monitoring that social media content.





## Customer Management System (CMS)

A Content Management System or "CMS" is a software application that enables users to create, manage, and publish digital content, typically for websites. CMS platforms allow users to easily create and edit content using a user-friendly interface, without requiring extensive technical knowledge or coding skills. They provide templates and themes that allow users to customize the appearance of their website or web pages. In some cases, your CMS might provide features such as search engine optimization (SEO) tools and content scheduling. Popular CMS platforms include WordPress, Drupal, and Joomla, among others.

## Search Engine Optimization (SEO) Software




Search engine optimization (SEO) software is a type of tool that helps businesses optimize their website and online content. This is done in order to improve their search engine ranking -in other words, how likely they are to show up in search engine results. Good use of SEO software can play a vital role in helping a company's online presence is visible to potential customers when they search for relevant keywords on search engines like Google, Bing, or Yahoo. Even though some of your CMS tools provide basic SEO functionality, you might need to get specialized software to get deeper insights into your rankings. A common and well known example of such a tool is SEMrush.






Even though there are many search engines available, the most common and widely used search engine is Google. Therefore, focusing your SEO effort for Google rankings are the most important, since few people will be using alternative browsers like Bing or Brave. Perhaps, with the advent of tools like Chatgpt, the way people browse the web will begin to shift, but for now, Google is still the king of search.



\*Fun fact - Global Internet Usage Dropped 40% During Google's Five-Minute Outage in 2013.



## Analytics Tools

Analytics tools are another important component of any modern marketing tech stack. These tools help businesses measure and analyse data related to their marketing efforts, such as website traffic, social media engagement, email campaign performance, and more. For example, analytics tools can help identify which channels are driving the most traffic or which content is resonating with their target audience.

There are various types of analytics tools available, including web analytics platforms like Google Analytics, social media analytics tools like Sprout Social or Hootsuite Insights, email marketing analytics tools like Pardot, Mailchimp, and more.



# Marketing Tech Stack examples



CRM / ERP

Social Media

E-mail

MKT automation/CMS

Project Management

Graphic Design



## Part Two:

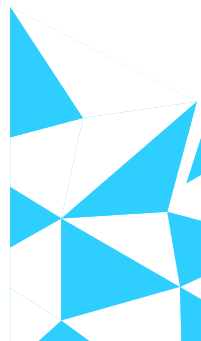
# The Buyer's Lifecycle



Now that we have established a definition of the technology stack as well as the marketing technology stack, let's move to the next part of this guide and discuss the buyer's lifecycle. You might be asking why this is relevant when discussing your technology stack upgrade. The truth is, understanding the your customers buying lifecycle is actually an important part of the decisions you make to improve your technology stack.

To get the most out of scaling your operations and tech stack, you want to know how your customers engage with your business, and how you can further enhance and compliment that engagement through a strategic deployment of additional technologies. For instance, if all your customers are contacting you through email, but you have a ticket system, you should investigate why customers are not using the ticket system. Perhaps it needs an improvement, or, perhaps it needs to be ditched.

By focusing on the right strategies and tools at the correct stages of the life cycle, your investments are more likely to yield higher returns and drive sustainable growth for your business.



# Stages of the buyer's lifecycle

To further understand the buyer's lifecycle, we divide the journey into distinct stages, which help us identify where their customers are in the buying process. Let's explore the different stages of the buyer's lifecycle.



It begins with **awareness**, in this case when a buyer becomes aware of the product or service for the first time. It could be a result of a personal challenge or desire that they seek to fulfill, and they are eager to find solutions. This stage is also referred to as the "top-of-the-funnel" or TOFU, and it triggers their curiosity. For instance, a person with a cluttered home may come across an organizing gadget and become intrigued, prompting them to dig deeper.



The next stage is called **consideration**. Here, the buyer has identified the problem or need and begins actively researching potential solutions. They explore different options and weigh the pros and cons of each one. This stage is also known as the middle-of-the-funnel (MOFU), where decisions start to take shape.





The third stage is **conversion**. At this point, the buyer narrows down their options and is ready to make a final decision. They compare sellers or suppliers, looking at costs, benefits, and more. This stage is also called the bottom-of-the-funnel (BOFU). For example, a buyer who has researched smartphones may compare different models of iPhones and Samsungs to determine the best option for their needs.

The fourth stage is retention. Once a buyer makes a purchase, they become a customer that needs to be retained. It's crucial to keep them happy and loyal by providing excellent support, suggesting complementary products, or making them feel part of a community that loves your brand. A coffee shop, for instance, could offer a loyalty card with free drinks and hold regular events for coffee lovers to build a tight-knit community.

Finally, you have **advocacy**. This is the stage all businesses thrive for. At this point, customers become enthusiastic followers of the brand. They enjoy its products and happily recommend them to friends and family, generating free publicity. This positive buzz attracts more clients and helps the brand grow. Successful restaurants, for example, rely on satisfied customers sharing their delightful dining experiences with others to attract new visitors and expand their business.



# Aligning the Marketing Technology Stack and The Buyer's Lifecycle

Now that you are aware of the various stages of the buyer's cycle, lets examine some ways you can start off in your journey to align and scale your marketing tech stack with it.

## 1. Map the buyer's journey

Outline the various stages of your buyer's journey and pinpoint crucial touchpoints where interactions happen. Focusing on each stage, you can identify the necessary technology to support it effectively.



## 2. Evaluate your current tech stack

Examine your present marketing technology stack and see which tools are employed during different stages of the buyer's experience. Spot any gaps or areas that require more tech support.



## 3. Identify new technology

Investigate and find the latest marketing technology tools to enhance your buyer's experience. Look for tools that seamlessly integrate with your current tech tools and offer the required functions for each stage.



## 4. Integrate and streamline

Integrate new technology into your existing tech stack and streamline processes to ensure a seamless customer experience. This step may involve automating workflows, reducing manual processes, and improving data management.



## 5. Test and optimize

Continuously test and optimize your marketing technology stack to improve performance and ensure alignment with the buyer's lifecycle. Monitor key metrics and make data-driven decisions to refine your strategies over time.



## 6. Train and educate

Ensure your team is trained and educated on effectively using the marketing technology stack. Provide ongoing training and support to ensure everyone is up-to-date on the latest tools and technologies.



When it comes to training, the importance of data quality is also something to be stressed. Improving customer experience and creating personalized journeys requires a continuous effort of data utilization.

It is essential that all team members recognize the significance of updating information whenever possible. Instead of considering data cleansing as a sporadic, one-time event, the team should adopt data validation as an integral part of their operations.

According to a [study](#) conducted by GS1 US on 24 companies, 50% of the analyzed data was found to be incorrect. Adopting a piecemeal approach to data quality can introduce errors that can impact the entire system.



## Metrics to keep track of the customer lifecycle

While a buyer flows through the various stages of the customer lifecycle, there are also some important metrics to keep track of during this process. These are metrics that can give you insight into the customer lifecycle journey and might reveal where you are winning customers, and where you are losing them. Of course, this will also help you adjust your tech stack and scaling strategies accordingly.

Here are some of the main metrics in a customer lifecycle that you should be aware of:



### Acquisition cost:

This is the cost of acquiring a new customer. It includes all the marketing and sales costs that are incurred in order to get a customer to make a purchase. This metric is important because it helps businesses understand how much they are spending to acquire new customers and whether it is worth the investment.



### Conversion rate:

This is the percentage of visitors to a website or store who make a purchase. A high conversion rate means that a business is effectively converting visitors into customers. Businesses can use this metric to identify areas where they need to improve their sales funnel in order to increase conversions.





**Average order value (AOV):**

This is the average amount of money that a customer spends per order. A high AOV means that customers are purchasing more items or higher-priced items, which can increase revenue and profitability for a business.

**Customer lifetime value (CLV):**

This is the total amount of money that a customer is expected to spend on a business over their lifetime. It takes into account the customer's purchase history, as well as factors such as retention rates and referral rates. A high CLV means that a business is doing a good job of retaining customers and generating repeat business.

**Churn rate:**

This is the percentage of customers who stop doing business with a company over a certain period of time. A high churn rate means that a business is losing customers, which can be costly in terms of lost revenue and marketing expenses. Businesses can use this metric to identify areas where they need to improve their customer retention strategies.

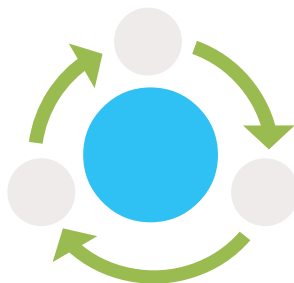


## Why is all this important?

Understanding your buyer's lifecycle can benefit your business in various ways. To start, it can improve your targeting by using customer data to personalize your marketing, resulting in higher conversion rates and ROI. It can also enhance the customer experience by tailoring your approach to each stage of the buyer's journey.

Additionally, knowledge of the customer lifecycle can optimize the allocation of resources by focusing on crucial stages, resulting in higher efficiency and returns. Another benefit of this awareness is that it can facilitate data-driven decision-making by providing insights into the effectiveness of strategies and areas for improvement.

Finally, understanding your customers buying lifecycle can provide a competitive advantage by offering exceptional service that outshines rivals, resulting in customer loyalty and retention.



# Part Three: How To Find The Right Tool For Your Technology Stack

Now that you've mapped out your marketing tech stack, understand the customers buying cycle and have the metrics and data to back your understanding, it's time to take that knowledge and put it in practice while you start looking for new solutions and improvements to scale your organisation. Here's how you can get going on your search for the right tool.



Review Websites



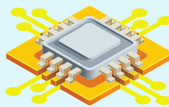
Google it



Ask your network for recommendations



Prepare a budget



Check Available Integrations



Match features with requirements



Check ownership



## Review Websites

Pretty obvious, but never underestimate the power of the review. Especially in the digital world, where opinions appear practically next to any product or service to be purchased. Reviews have the remarkable peculiarity of providing confidence since they come from customers who have experienced the service or product firsthand. While not all of them represent reality, you can generally get a good idea of their performance.

It is advisable to look at reliable review platforms like G2Crowd, Salesforce AppExchange, and Capterra, among many others. In addition to the rating, you can know the pluses and minuses of each of the options.

## Google it

Obvious but true nonetheless. Google is often the first place an investigation starts. Google may understand your company's nature. Thanks to the efficient way it captures data and deciphers behavior, it is possible to find listed reliable insights. The best options are almost always at the top of the list, but we recommend you go further. Don't rely only on more than just paid ads but on organic results that appear first.

We recommend you create a comparison chart where you write down all the options from all the possible software, their features, prices, subscription terms, requirements, and unique value. This chart will make it easier to contrast, prioritizing objective aspects over subjective ones.





## Ask your network for recommendations

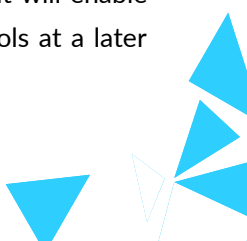
The old adage still rings true: there is no better advertising than word-of-mouth. You can get the valuable guidance by contacting the right people on platforms like LinkedIn. An honest opinion offers a level of credibility that only experts can provide. To do this, you can do the following:

- Ask for specific or available references in groups and digital communities.
- Search for mentions and hashtags in the search engine to find recent ratings. This way, you can focus on the positive and the negative.
- Write a post asking your community for support. You never know who within your circle might offer a good review.

## Prepare a budget

The budget is the reality that all decisions are made on. An unlimited budget would be ideal, but unfortunately not the reality of any business. That's not to despair though, if you make a careful analysis of the tools needed, their impact, and effectiveness of each tool, your budget will work in your favour rather than against you.

Here are some general tips when preparing your budget:

- Look out for tools with flexible options that allow you to renew, upgrade, and cancel if necessary.
  - Plan for the future, for instance, consider options that will enable you to enhance functionality with complementary tools at a later stage.
- 

Break down your expected outcomes and results over key periods that you set up for review and whether your budget will match these outcomes.

### Check Available Integrations

Naturally, you want to make sure the any solution you chose is compatible with your current technology stack. In some cases, many of the tools you already employ are doing a good job. However, adding a new solution might offer superior capabilities when used in conjunction with your current stack. Therefore, check out whether a solution you choose can provide integrations that might compliment new areas of your tech stack.

Today, many solutions will come in the form of “SaaS” or Software as a service. There are some key benefits to SaaS solutions, such as no software installation required, rapid deployment, automatic updates & maintenance, flexible scalability as well as lower upfront costs.

### Match features with requirements

A lot of solutions offer an endless list of features, but the only important ones will be the ones you need. Be open to implementing additional services, considering that your business will grow. Start with just what you need and prepare yourself for greatness.

### Check ownership

Be careful with the terms and conditions offered by any chosen option. Make sure you do not share ownership and keep your data safe. This will convey security to your customers. Opt for a holistic solution that allows you to manage your records within one place without the need to migrate and even lose information in the process.



# Part Four: Implementation

The **implementation** is the phase where the actual deployment and configuration of the technology components take place, aka, the exciting part. This phase usually involves a team of individuals who work together to ensure that the technology is installed and configured according to the project's requirements.



This stage is critical because it determines the success or failure of the project. The people involved in the implementation stage may vary according to the size and scope of a project, but typically include project managers, software developers, database administrators, network engineers, system administrators, and quality assurance specialists. These individuals work collaboratively to install and configure the various components of the technology stack.

Next, we examine six steps to implement a newly acquired solution and successfully drive adoption:

**1. Develop an implementation plan:**

The first step is to develop a detailed implementation plan that outlines the tasks, timelines, and responsibilities involved in deploying the new solution. This plan should also include contingency measures in case of unexpected issues during implementation.

**2. Prepare the environment:**

Before implementing the new solution, it's important to ensure that the environment is prepared to support it. This may involve installing required software, configuring necessary hardware, and ensuring that all dependencies are in place.

**3. Test the solution:**

Once the environment is prepared, it's important to thoroughly test the new solution to ensure that it's functioning as expected. This may involve running tests, debugging issues, and performing user acceptance testing to ensure that the solution meets the requirements.

**4. Deploy the solution:**

Once the new solution has been thoroughly tested, it's time to deploy it into the production environment. This may involve deploying the solution to servers, installing client software, and configuring network settings to ensure that the solution is accessible to users.

**5. Train users:**

To ensure that users can make the most of the new solution, it's important to provide training and support. This may involve creating user manuals, conducting training sessions, and providing ongoing support to address any issues that arise.

**6. Monitor and optimize:**

Finally, it's important to monitor the new solution once it's deployed to ensure that it's performing optimally. This may involve using performance monitoring tools, analyzing user feedback, and making necessary optimizations to improve the solution's performance and usability.



# Part Five:

# Measuring the Success of your Tech Stack

Measuring the success of your tech stack is an important exercise and can provide several benefits for your business. You may assume everything is successful, but a proper audit will turn feelings into facts. It also help you keep things in order, because as your tech stack expands it can become disorganized and bloated, leading to a loss of productivity and wasted tim. By auditing your tech stack, you can streamline your team's workflow and identify redundant tools that are causing problems.

Here are some important steps to take when auditing your technology stack.

## 1. Define goals and objectives



Before just jumping right into the audit, you should begin with a plan to define your goals and objectives for your marketing tech stack. Knowing this in advance will better prepare you to determine what tools and technologies you need to achieve those goals.

Examples of goals and objectives could be increasing website traffic, improving lead response time, enhancing customer engagement, or improving your social media presence. Once you have determined a clear understanding of your goals, you are ready to move on to the next step.



## 2. Take an inventory of your current technology stack



Step two is to take an inventory of all the tools and technologies currently in your marketing tech stack. This should include both software and hardware, as well as any data sources or integrations. To make sure you don't miss anything, use a checklist to ensure you capture all the necessary information.

## 3. Evaluate the effectiveness of each tool



Now that you have an inventory of your tech stack, it's time to consider the effectiveness of each tool and whether they are achieving their intended goals. This involves assessing whether each tool is delivering the expected value and bringing a return on investment. To evaluate effectiveness, consider criteria such as:

**Cost:** Is the tool providing a positive ROI?

**Ease of use:** Is the tool user-friendly for your team?

**Integration capabilities:** Does the tool integrate well with other tools in your stack?

**Performance metrics:** Is the tool delivering the desired results?

## 4. Identify redundant or underutilized tools



In this step, you will want to identify any redundant or underutilized tools in your tech stack. These tools are no longer necessary or not being used to their full potential. Examples of tools that might be redundant or underutilized include email marketing platforms, social media management tools, and analytics software. By eliminating these tools or optimizing them for better use, you can reduce costs and simplify your tech stack.



## 5. Analyze your data sources and integration capabilities



Your marketing tech stack will rely on data from various sources and integrations to function as intended. Is the data flowing seamlessly through your company? Is it getting bottlenecked or fragmented due to poor integration between your systems, or other issues that could hinder your ability to leverage data insights? In this step, you will want to analyze those data sources and integrations to ensure they are working properly. Some examples of data sources you might analyze include your CRM systems, web analytics, and marketing automation platforms.

## 6. Develop an optimization plan



Using the insights you gained in your investigation so far, the next thing on your checklist is to develop an optimization plan for your tech stack. You might consider reducing reliance on redundant tools, investing in new products that address your current problems, or enhancing integration capabilities. The goal is to simplify your technology stack, reduce your costs, and achieve better results from the systems you use. Your optimization plan should be informed by your goals and objectives, and the data and insights gathered in the previous steps.

## 7. Implement and monitor your optimization plan

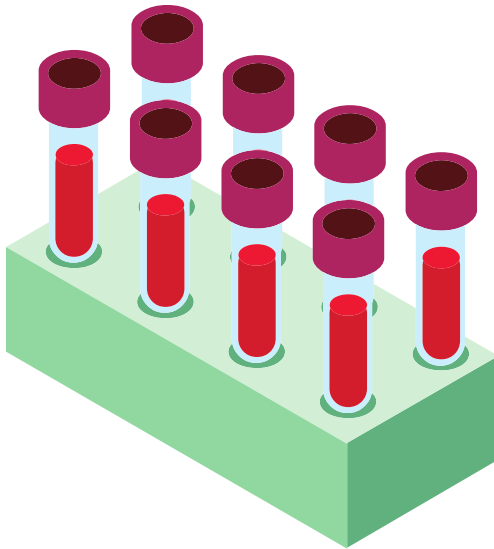


Once you have developed your optimization plan, it is time to put it into action. It could be the scary part, because you are doing something new, but you have built a solid plan to implement it. You might invest in new tools or technologies that align with your goals. What you already have might work, but it needs adjusting and some better configuring. The key here is to monitor the impact of your changes closely to ensure they are delivering the desired results. For instance, did the new email marketing platform you invested in help improve communications with clients?



## Tips for measuring the results of your implementation and optimization plan:

- Set up regular check-ins to evaluate the progress of your optimization plan.
- Consider conducting A/B tests to compare the impact of different tools or configurations.
- Continuously monitor and adjust your tech stack as needed to ensure it remains aligned with your goals and objectives.



# Part Six: Break down the silos between marketing, sales & customer success

When silos between sales, marketing, and customer success are broken down, something happens: customers become the center of focus for all departments. Customers no longer feel like a secondary priority for these teams - their needs are humanized and understood throughout the organization. It's not just sales managers or marketers deciding how to optimize customer success - it's now everyone's job. With shared data points across silos, marketers can ensure their retention strategies match sales ambitions and customer success values.

Breaking silos down helps unify the customer experience for everyone involved.

Sales

Marketing

Customer  
Success



### Consider the following:

- **91%** of B2B companies use content marketing, but only 30% have a defined buyer journey that motivates their content strategy across sales, marketing, and success (Sarah McKinnon, 2019).
- **60%** of B2B buyers said they get most of their information from sources other than sales reps because vendor-provided content is not targeted or relevant (Forrester, 2017).
- **77%** of B2B buyers say their latest purchase was complex or difficult (Gartner,2017).

By working together, sales, marketing, and customer success teams can gain a deeper understanding of the customer's preferences and pain points. For what? Knowing your audiences and customers can able you to create better products, offer a better service, and marketing campaigns that resonate with the target audience.



# How to Achieve Sales, Marketing, and Customer Success Alignment?

Aligning marketing, customer success, and sales can be challenging. Each team has its own goals and objectives. Marketing is focused on generating leads and creating brand awareness, customer success is focused on delivering an outstanding customer experience, and sales is focused on closing deals and growing revenue.

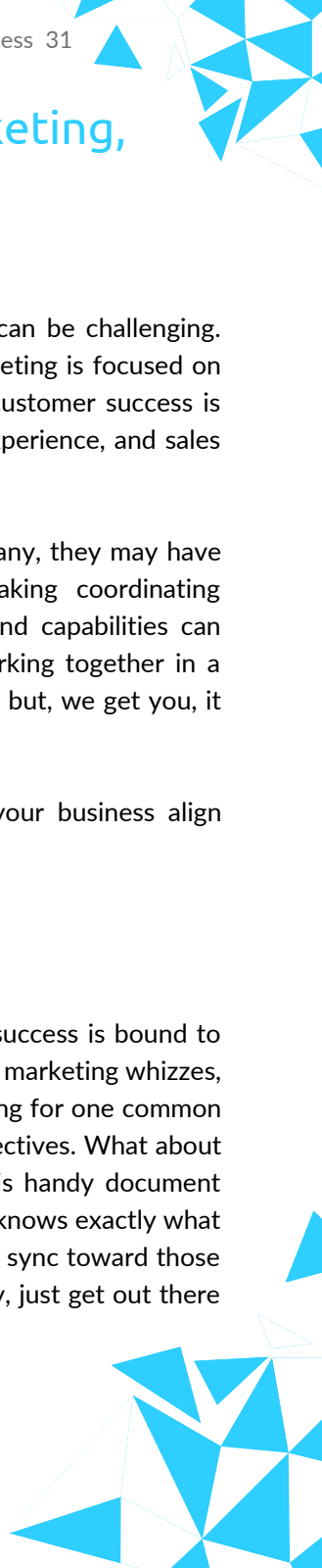
Although these teams are part of the same company, they may have different visions, processes, and strategies, making coordinating efforts difficult. Different timelines, resources, and capabilities can cause issues when creating a cohesive plan. Working together in a unified way is key to driving successful outcomes, but, we get you, it takes some effort to achieve.

Here are some strategies to help your unlock your business align sales, marketing, and customer success:



## Define Shared Goals:

When everyone's on the same page, success is bound to follow. So let's ensure your sales team, marketing whizzes, and customer superstars are all shooting for one common goal aligning with overall business objectives. What about a Service Level Agreement (SLA)? This handy document will help you ensure each department knows exactly what they need to do so everybody stays in sync toward those big goals. Go nuts or light – either way, just get out there and shoot for gold.



## Regular Communication:

Keeping in touch is key! It's essential that sales, marketing, and customer success teams stay connected to ensure everyone stays up-to-date. Regular meetings make for an excellent opportunity to coordinate plans together as well - plus, having a dedicated set of communication protocols makes sure every team member knows what their customers need or are hoping to achieve. All this detailed collaboration between departments will help provide amazing experiences tailored around each customer!

# 2

## Define a single style and tone of voice:

Sales, marketing, and customer success should use common language and terminology to avoid confusion and misunderstandings. How do you want employees to refer to products and services? Or what to call a certain work tool? To achieve this, you can create a shared glossary of terms so everyone can speak the same lingo. Also, you may need to use unified systems and train team members in standard procedures. A holistic solution might be the answer to your problems.

# 3

## Collaborate on Customer Segmentation:

Unify your efforts and make sure each customer receives the perfect message by collaborating on customer segmentation. You can organize customers into groups based on size, industry, and location - whatever works best for your company and staff. Take it a step further to tailor your services even more precisely and create segments according to product/service purchased, purchase frequency, or length as a customer. Harnessing collaboration power will ensure everyone gets what they need.

# 4





# 5

## Analyze and Optimize:

Sales, marketing, and customer success should regularly analyze the results of their campaigns and strategies to identify what works and what doesn't. This information can be used to optimize future campaigns and improve alignment between the teams. You can also gain valuable insights into what techniques are most effective. This will help ensure that future campaigns capitalize on successful initiatives while aligning all teams with one another. Ultimately this provides a better overall understanding of customers' needs, leading directly toward increased revenue and satisfaction!





## Part Seven: The Importance of Data Quality

Data quality is essential for businesses today, no matter the industry. Take a company like Disney. They know their success lies in understanding its customers and optimizing its internal operations. That's why they use data to stay connected, track performance metrics, and ensure that all locations run optimally. From collecting information on customer preferences to leveraging data to plan the future, Disney uses data to ensure that all its parks, offices, and center's deliver a magical experience. Data isn't just part of Disney's business plan; it's essential. Data is the key to unlocking the potential of any industry, and Disney has mastered it!

Quality data enables better decision-making, enhanced customer experiences, and compliance with laws and regulations. It powers upper management and other stakeholders to make informed decisions.

To achieve the best possible data quality, it needs to be woven into a company's DNA and become part of the way they work. In other words, data quality should not be seen as just a problem for the IT department, but recognized as a priority throughout a company's various teams.



A study from AgileData.org came to a shocking conclusion: 66 percent of development/IT teams choose to bypass the data practices. Perhaps they don't see it as "their problem", or perhaps they do not even realize it is a problem at all. But one thing is clear from all studies conducted in the area of data quality's impact on business: the cost of poor data isn't negligible and definitely shouldn't be ignored. Here is some advice and best practice tips on Data Quality for your organization:

### 1. Establish Clear Data Quality Standards

Establishing clear data quality standards is the first step in improving data quality. By setting clear expectations for how your data should be collected and managed, you can more easily identify errors and gaps in the data.



### 2. Automate Data Validation



Automation can be a powerful tool for improving the accuracy of your data by quickly validating it against established criteria. Automated validation can help you identify errors before they become costly problems. We know it's not that easy to trust AI, but we strongly recommend it.

### 3. Monitor Data Quality Metrics

Tracking key metrics such as accuracy, completeness, consistency, timeliness, and integrity will help you quickly identify areas where your data needs improvement. There's more than meets the eye. Refrain from relying on your perspective and leave your data in the hands of solutions that know how to decode and interpret your customers' information.



#### 4. Invest in Data Quality Tools



You know what they say: Cheap is expensive. Investing in specialized software or tools designed specifically to monitor and improve the quality of your data can be an invaluable asset. These tools often include automated validation checks and reporting capabilities, making tracking and improving data quality easier.

#### 5. Implement Robust Security Protocols

Developing robust security protocols is essential for protecting your data from unauthorized access or manipulation by external parties. Encrypting sensitive information, implementing user authentication measures, and regularly auditing access logs are all important steps for securing your data from potential threats.



#### 6. Regularly Audit Your Data Sources



As part of any comprehensive strategy for improving the quality of your data, it's important to regularly audit all sources of incoming information to identify any potential issues or inaccuracies that may exist before they become a problem down the line.

#### 7. Train Your Employees on Proper Data Practices

Training employees on proper data practices is another essential step for improving overall data quality across your organization. Employees should understand how to properly enter information into databases or systems correctly so that it is accurate and consistent with other sources of information within the company's systems or databases. Yes, to make errors is human and acceptable, but only up to a point. Provide your employees with tools to reduce error rates; this is a shared responsibility.



*\*Some might say, "my organization doesn't have bad data, we have a good system for collecting information in an accurate way". Well, a recent Salesforce study found that, the average customer's contact database is composed of 90% incomplete contacts, with 20% of records being useless due to several factors, such as 74% of the records needing updates and more than 25% of those being duplicates.*



# Measuring Data Quality and Data Governance

With all the talk about data quality, it's time to take a look at what data quality actually is, and more importantly, how do we measure and assess it? Here are three essential benchmarks for measuring your data.

## 1. Accuracy

As the accuracy of the data is a measure of how closely it resembles the true value, it's essential to consistently evaluate and maintain the correctness of the information in our databases. To gauge the accuracy of your data, assess the percentage of exact entries. You can improve your chances of achieving your goals by diligently maintaining accurate and complete customer contact information, such as phone numbers and emails.

## 2. Data Completeness

Data completeness is like assembling a jigsaw puzzle where each piece represents vital information contributing to a comprehensive and enlightening picture. Imagine trying to solve a puzzle with missing pieces – it's frustrating and hinders our ability to understand the whole image. Similarly, in data analysis, it's crucial to have reliable and consistent data to extract valuable insights that will drive informed decisions. By evaluating the percentage of complete entries in your dataset, you can determine how well-populated it is and potentially identify any data quality issues. For example, when delving into your company's customer purchase history, it's essential to record all the product details, such as size, color, and price, for each entry. By focusing on data completeness, you are setting the foundation for accurate analysis and better decision-making, ultimately contributing to the success of your business.



### 3. Data Timeliness

Imagine a world where data never goes out of date, and the information you collect today remains relevant and valuable for years to come. This fascinating concept, known as data timeliness, offers many benefits for organizations seeking to optimize their resources and stay ahead of the curve. The idea revolves around the belief that it holds significant value in various contexts and timeframes once you've gathered important data. This allows businesses to streamline their decision-making processes without needing to constantly update or re-collect data, ultimately saving precious time and effort.

How do I quantify data timeliness? Analyze the current percentage of current entries with today's events and trends. For instance, companies tracking market research can determine how fresh their data is by examining how many entries are based on the most recent data points. Embracing data timeliness paves the way for a more efficient, agile, and data-driven organization, setting the stage for a successful and sustainable future.

### 4. Data Consistency

All the data you access must be accurate, complete, and up-to-date, no matter what application or database you use. That's the beauty of data consistency, a state that ensures your system's integrity by maintaining reliable, accurate, and consistent data records across various sources. Thanks to data consistency, you can always count on having the same information at your fingertips.

But how do you make sure your data consistency is up to par? The trick is to evaluate the percentage of entries that follow standard formatting guidelines or templates. Let's take employee performance reviews, for instance. A company can easily measure data consistency by assessing how many entries adhere to established template formats for presenting feedback and ratings. This way, you can ensure a seamless user experience and maintain high professionalism throughout your system.



## Case Study:

# How Booksy leveraged its tech stack to drive revenue more effectively

Booksy uses various technology products and services to support its business operations, including HTML5, jQuery, Google Analytics, Viewport Meta, iPhone/Mobile Compatible, and SPF. However, the quantity of technologies is not as crucial as how they are integrated and used to achieve business goals.



To align their technology stack with their customer lifecycle, it's essential to understand the different stages of the customer journey. A customer relationship management (CRM) platform like Salesforce can be invaluable for managing customer data and tailoring marketing strategies to their needs and preferences.

By using Salesforce, Booksy can manage customer data such as booking information and preferences to gain insights into customer behavior and preferences, making informed decisions about engaging with customers.

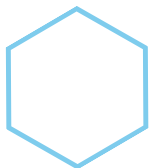


Salesforce is a critical component of Booksy's tech stack, allowing them to manage customer data effectively and personalize marketing strategies to customers' needs and preferences. By integrating Salesforce with other technologies, Booksy ensures seamless data sharing across all systems, delivering a personalized and effective customer experience.

### Plauti Helps Booksy Get Cleaner Data

Having access to customer data is only useful if that data is accurate and up-to-date. In Booksy's case, the company faced data cleanliness challenges (among others). The company's customer data was spread across various systems, thanks to their wide tech stack, making it difficult to get a complete view of each customer. This issue also led to duplicated data and other inconsistencies that made it difficult to use the data effectively.

Running a business can be tricky; things don't always go according to plan. Unfortunately, when the staff at this particular business had to rely on something other than artificial intelligence to get the job done, the customer experience took a hit. It was like trying to play Jenga blindfolded – it just wasn't working out. But with some creativity and some elbow grease, they were able to find a solution that put the "human" back in "human interaction."





That's how Booksy turned to Plauti, a Salesforce partner, to solve this challenge. Plauti helped Booksy to clean up its data and consolidate it into a single source of truth within Salesforce. This allowed Booksy to gain a 360-degree view of each customer, including their booking history, preferences, and other key data points.

### Clean Data = Stronger Bottom Line

Duplicate Check from Plauti has been a game-changer for Booksy, allowing the company to achieve greater efficiency and effectiveness in many areas of its operations. By eliminating duplicate customer data, Booksy was able to create a single, comprehensive view of each customer. This action allowed the company better to understand its customers' booking history and preferences and use this information to create more targeted marketing campaigns.



In addition, with clean data, Booksy was able to streamline its operations and provide a better customer experience. For example, with a 360-degree view of each customer, Booksy could easily match them with the right service provider, leading to a more positive experience.

But most importantly, cleaner data has enabled Booksy to drive revenue more effectively.



The company has increased its conversion rates and driven more bookings by using customer data to create targeted marketing campaigns and tracking the correct metrics. Additionally, by providing a better customer experience, Booksy has retained more customers and increased its lifetime value.

One specific example of how Booksy has used cleaner data to drive revenue is through a targeted email campaign. Using Plauti Duplicate Check, Booksy was able to identify and remove duplicate customer records, ensuring that each customer received only one email with the targeted promotion. By leveraging its clean data and tailoring the content of the email to each customer's booking history and preferences, Booksy saw a significant increase in bookings from this campaign.

Regularly auditing the tech stack and promoting cross-departmental collaboration and communication as silos would be the last steps. This ensures that companies use the latest and most effective technologies while fostering teamwork between departments such as Marketing, Sales, and Customer Success.

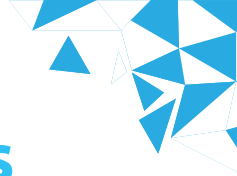


By doing so, Booksy can stay up-to-date with the latest trends and technologies and have good data governance, which can help the company maintain a competitive edge and position itself for long-term success.



Overall, Booksy's success is a testament to the importance of having a strong tech stack and how it can be leveraged to achieve business goals. By partnering with Plauti and investing in its tech stack, Booksy has set itself up for continued success in the future.





# Closing comments

We hope this e-book has helped you learn more about scaling your technology stack, the relationships of your different teams, and the the importance of quality data to help you understand the inner workings of your processes. As a company grows, scaling the operations won't happen automatically, and it cannot be taken for granted that scaling operations will be a straightforward process. To scale an organization, you need to prepare the right set of procedures and actions in advance so when it comes time to take action, you're prepared and confident to implement your plans.

While strategic action plans are essential to realizing your vision, it's also important to recognize that they cannot be rigidly set in stone. As we know, especially in recent years, unforeseen events can arise, market trends may shift, or new competitors can emerge. As a result, you may need to make swift adjustments to your plans at some point in time. So, prepare to the best of your abilities, but be agile. A plan B is never a bad idea in this regard.

In addition to having a plan and being agile, you need to have the best insights possible into your organization. It's hard to measure what you can't see. Or, perhaps you can measure things, but how reliable are your measurements? To achieve reliable measurements, you need reliable data. And, unfortunately, complete, reliable, error free data is usually the exception, not the norm.





This is especially true with CRM data, which is usually aggregated through various channels, like email forms, events, etc. Incomplete, inaccurate, and duplicate data is bound to arise. In fact, Salesforce itself stated that about 91% of CRM data is incomplete, and 70% of that data decays annually.

Plauti Data Management (PDM) was designed with Salesforce integration in mind from day one, making it a comprehensive suite platform. As a result, it offers effortless integration into your Salesforce org and seamless functionality between the applications. With Plauti Duplicate Check, for example, you can combine it with Record Validation. This enables you to authenticate your records while simultaneously checking if the new record you're generating already exists in Salesforce. This would not be achievable with two separate point solutions without additional inconvenience.

**If you're interested in creating a single source of truth in your Salesforce org, visit [plauti.com](https://plauti.com) and connect with one of our subject experts to learn more about how PDM can assist you.**

