

Data Completeness and Hygiene Dashboard

...Creating a dashboard to monitor data quality



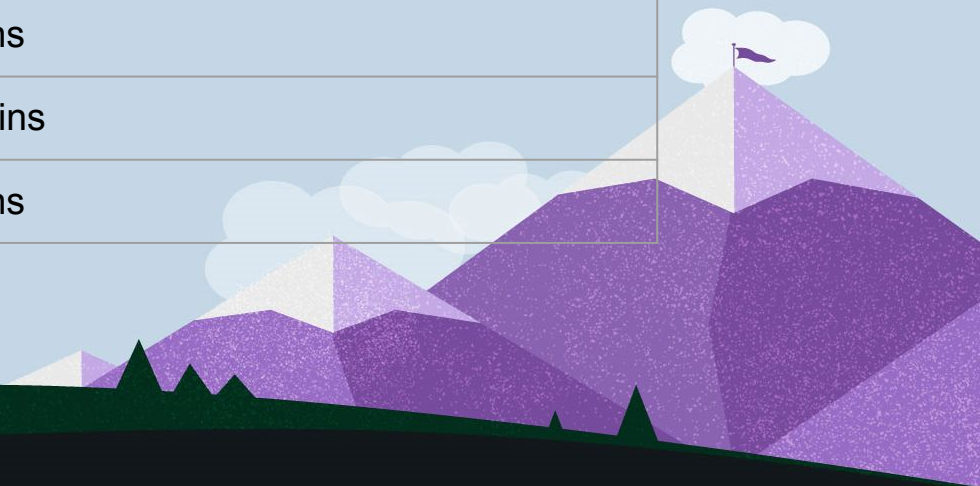
About the presenter



Dominique Beaudin
20+ years analytics experience in various tools and
analytics datasets
2 X Salesforce Certified

What we will cover

Data Completeness	5 mins
Data Hygiene	5 mins
Dashboard and Recipe Overview	25 mins
Q & A	5 mins



Data Completeness- a component of Good Data

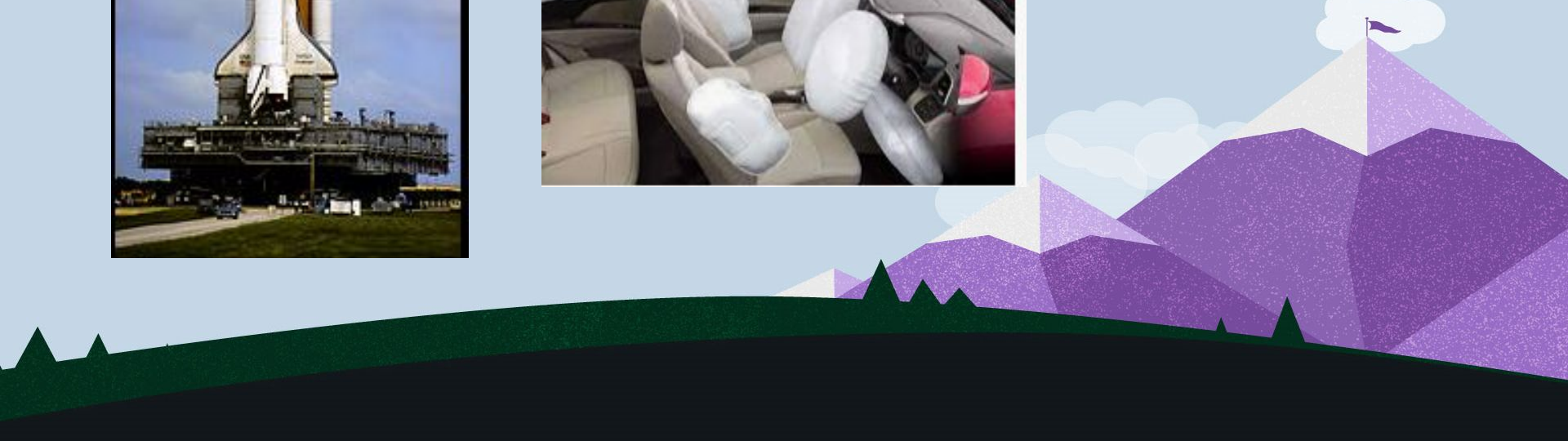
Good / Complete Data = Good Decisions



How do you know if your data is complete Data?



Cautionary Tales around data...

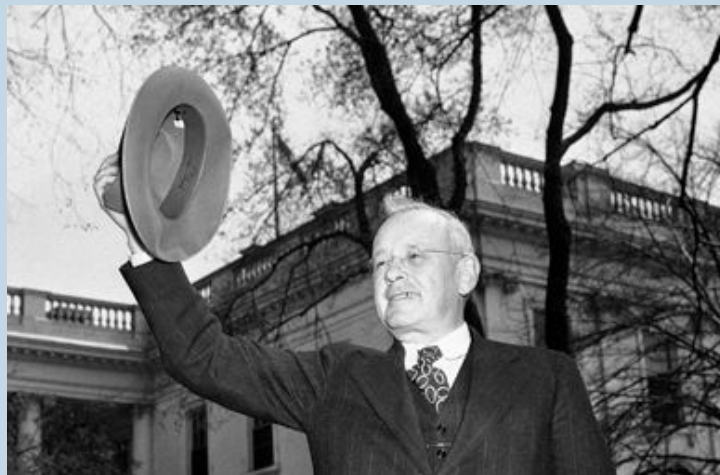


Data Hygiene

How Do I control this?

Best practices:

- Required fields (need but minimize)
- Avoid open text boxes for categories
- Be aware of “convenience sampling”
- Source monitoring

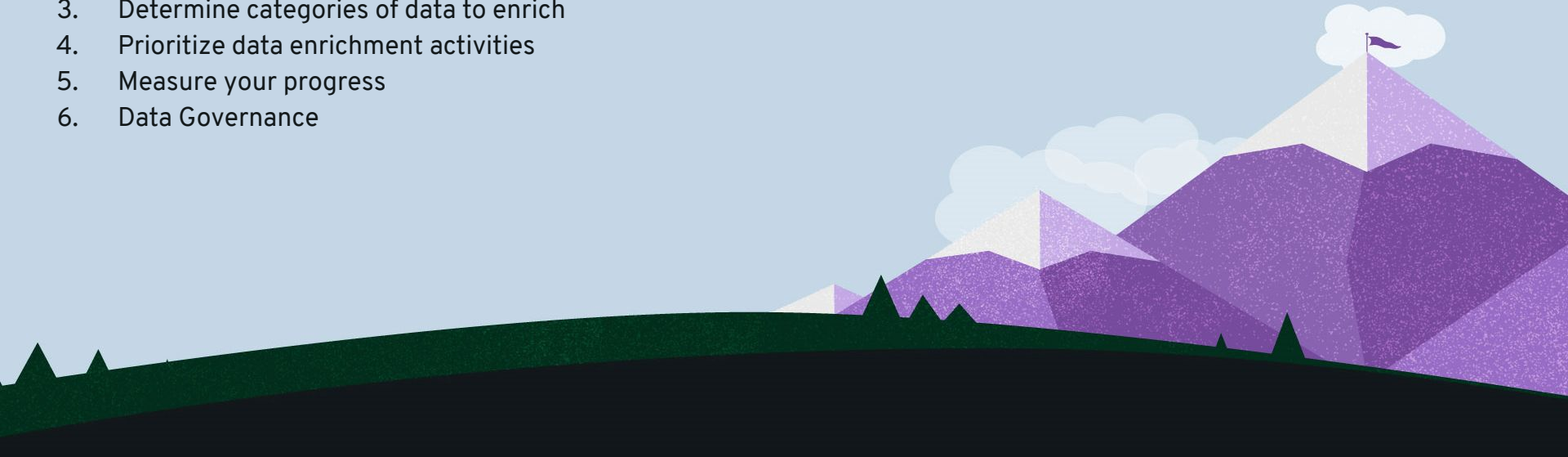


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Data Completeness KPI

You should have a data cleanliness/ completeness KPI

1. Identify your MOST ACTIONABLE Data
2. Identify non actionable data / Spurious data
3. Determine categories of data to enrich
4. Prioritize data enrichment activities
5. Measure your progress
6. Data Governance



Data Governance / Hygiene

Key items

- Where is your data?
- How is your data secured (encrypted, audited, logged)?
- How is your data managed (backed up, restored, protected, compliance rules)
- How is your data used (who, where, timing, archive) ?
- What type of data do you have (PII, HIPAA etc)?
- What is the quality of your data?

Want to read more? <https://www.cio.com/article/3521011/what-is-data-governance-a-best-practices-framework-for-managing-data-assets.html>



Identifying data gaps

For Our Demo

Scenario: 3 Goals:

1. Improve data completeness for Pardot Prospects in the following areas to complete marketing personas by location
 - Company
 - Last Name
 - State
 - Industry
2. Determine the “source” of the incomplete data
3. Easily Download and use files to enrich the data
4. Add external data to create an enrichment import



Why Tableau CRM?

Lots of ways why this one?

- Combine data in endless ways from SF and Pardot
- Enhanced, connected visualizations
- Can connect across data sources, orgs etc
- Use recipe transformation to create “rules” and “flags”



Recipe Basics for Creating totals

Elements of the Recipe

Transforms to change nulls into 0 to create metrics ready data

Use Transform flag (0/1) to create totals and %

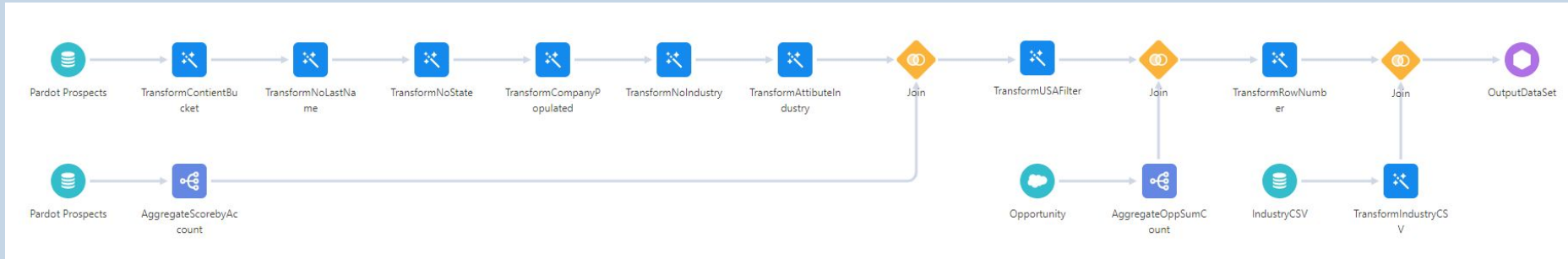
Join datasets and add aggregates

Add flags to filter out “noise” through a filter on the dashboard

Create a flag to allow aggregates to be filtered in a one to many dataset



Recipe:



Dashboard Layout

Elements of the Dashboard

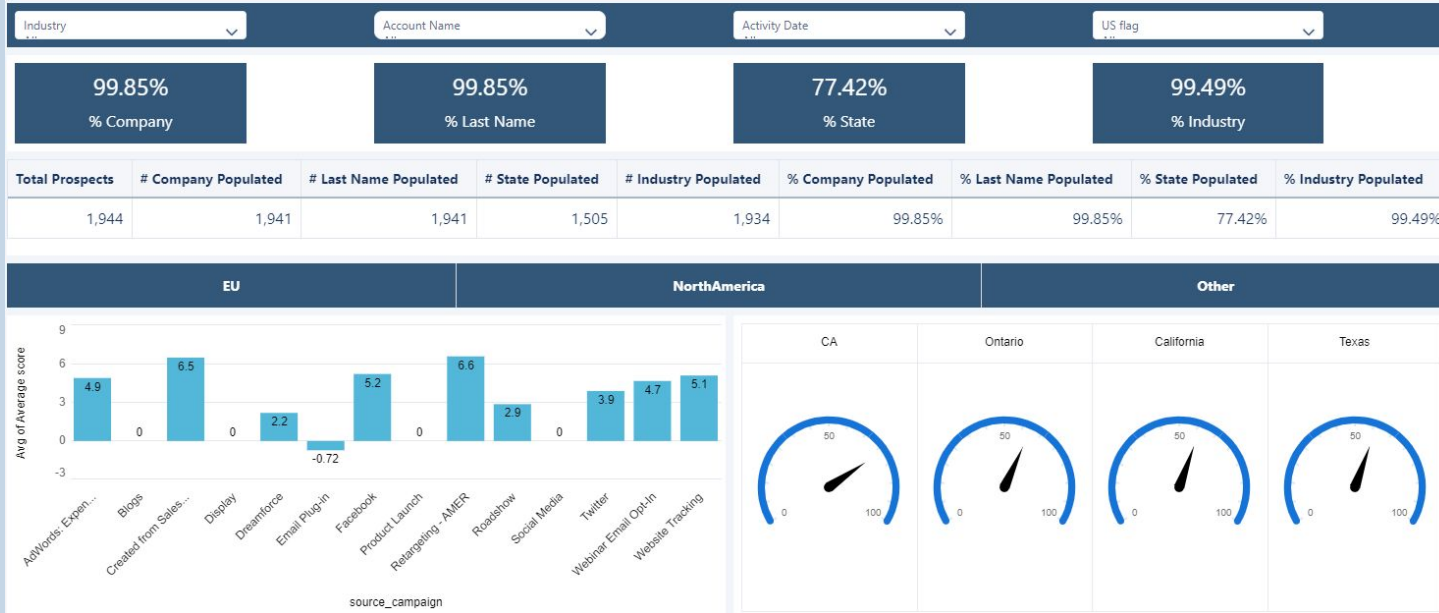
Summary KPI on top

% completeness by required field

Score by completeness visual



Data Completeness



What do we need?

Considerations and Questions to Answer

How complete is each segment being examined?

What areas require the most focus?

How can I download the data to enrich it or further analyze it?

What campaigns may have created the prospects?



DEMO!

If you would like the JSON files for the Recipe and Dashboard, drop your email address in the Chat or email me and I will be happy to provide it!



Thanks for listening!



You can find me on [LinkedIn](#) or hit me up at dominique@sercante.com

