




Finding Peace With Your Data

 **Can you find peace with your data? Yes, and it begins with setting an intention!** This worksheet is to be used with the recorded practice, which will guide you through setting your intention for cleaning up your Salesforce instance's data. It can be easy to jump into cleaning up data without intention, but we recommend starting with this practice to focus the work as you begin.

It's important to carve out at least 10 minutes for the recorded practice, 15 to 20 minutes for this worksheet, and then 1 to 3 hours for implementing your plan, depending on the intention set.

What is an intention? This is the "what will I be doing" answer. How often have you begun to clean up data and then realized that you were distracted by the phone or email or something else? That's totally normal, however, if you spend some time sitting with the recorded practice (and perhaps practicing more beyond that), the intention you set will attract more of your focus and energy to be accomplished. You'll find yourself "in the zone," getting more done in less time.

We encourage you to take the time to listen to the practice, sit in silence preparing your plan, and then implementing your plan. We recommend doing this all on the same day and setting a separate intention each day to align with your work for that day. It may be that the same intention can work across multiple days, but often our emotions change from day to day, so I encourage you to practice every day while working with data clean up.

If you work in a team, please feel free to do this together as you work on different parts of the data clean-up process. It's fine to listen to the practice together, but please write out your own intention, as each is very personal. Sharing them with each other is also welcomed but optional. Listen for what feels right for your team.

Intention Setting: Cleaning Your Instance

This is the worksheet you should print to place in front of you during your practice. This will be used to note your feelings as well as setting your intention and the plan. The following pages also provide resources to help once you make a decision on what path you are taking with your data clean-up.

Date _____

Emotion/Energy _____

Intention

Set your intention from the practice. Here are some ideas. Feel free to use one of these or write your own: Review existing data, Clean up existing data, Declutter page layouts, Declutter reports, Evaluate fields, Review Validation Rules, Review Processes, Review Flows, Review Workflows

Plan

Define the steps you will take to step into your intention. For example, for review existing data, you might want to use a tool to help you uncover the fields on a specific object or maybe review your data dictionary to ensure it has been updated or begin to document fields in a specific set of objects. Write a few steps to accomplish and use the tips below to help you think through what you might want to consider.

Preparing Your Sandbox

Sandboxes let you play with your data, and work out bugs and challenges before making the changes part of your actual, production database. It's also a safe spot to work on the data away from team members who may be accessing the database. Depending on the data clean up you working on, you may want to work with portions of your data or perhaps the all the data. **Here are options for sandboxes, from least to most expensive:**

Sandbox	How to Get	Price
Apsona – A basic tool. Remember to import the SF ID from production into the Sandbox as an External ID and use it to link up the data.	http://www.apsona.com	Free for some organizations. Check website for details.
Smart Sandbox	http://www.smartsandbox.com	7-day trial – use code DBSherpa to get \$20 off a monthly plan
Talend – A slightly more complex tool.	www.talend.com	Free
Wingman Data	http://wingmandata.com/Home/Index	Free
SFXOrgData	https://www.sfapex.com/download.aspx	Free
Full Sandbox	Contact your Account Executive.	Three-month pricing



When To Use Sandbox?

Use the sandbox when you know you are changing automations from Process Builder or Flow and to check your Validation Rules. Basically anytime you are making changes that would have a large impact on the user if it didn't work correctly. We recommend you try it in the sandbox first, test it out and then put into production. Remember to take our time when doing this type of work. It required a little bit of nervousness or fear, so use the energy of those emotions to guide you.



Ideas & Resources

Here are a few ideas and resources for you to use when developing your plan after setting your intention.

- Review existing data
 - Find duplicated data and uncover why it's being duplicated – user entry or integration with external system ([Demand Tools Single Table Dedup](#) is helpful)
 - Evaluate picklist values, verify meaning of values with users and document
 - Discuss any year end challenges with the users
- Evaluate fields
 - Using [Field Trip](#), find fields with little or no data
 - Review data dictionary with users to verify field usage
 - Discuss additional fields needed
- Review Validation Rules
 - Review existing active validation rules with users, are they helpful?
 - Review inactive validation rules, why keep them?
- Review Workflows, Processes & Flows
 - Review existing processes, ensure they are documented.
 - Review inactive processes, are they needed?
 - Discuss additional processes
- Clean up existing data
 - Dedupe data uncovered
 - Remove fields no longer in use
 - Remove validation rules, process and flows no longer needed
 - Verify addresses, emails and other contact details (a volunteer could help here)
- Declutter page layouts
 - Review page layouts with users for input on field usage
 - Discuss page layout and data entry, move fields as needed for user
 - Create sections to make it easier to manage data
- Declutter reports
 - Remove fields no longer needed
 - Discuss with users reports used and remove those unneeded reports
 - Work with users to create generic reports
 - Discuss with users any challenging reports



Celebrate!

When you have set this intention and followed through on your plan, be sure to share the results with your team and with the community on the Power of Us Hub. We invite you to share your successes, fears and even your worksheet with Database Sherpa. Reach out and ask for advice and guidance, we are here for you to provide you a Sherpa to help guide and nurture your natural abilities.