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Dynamics 365 CE



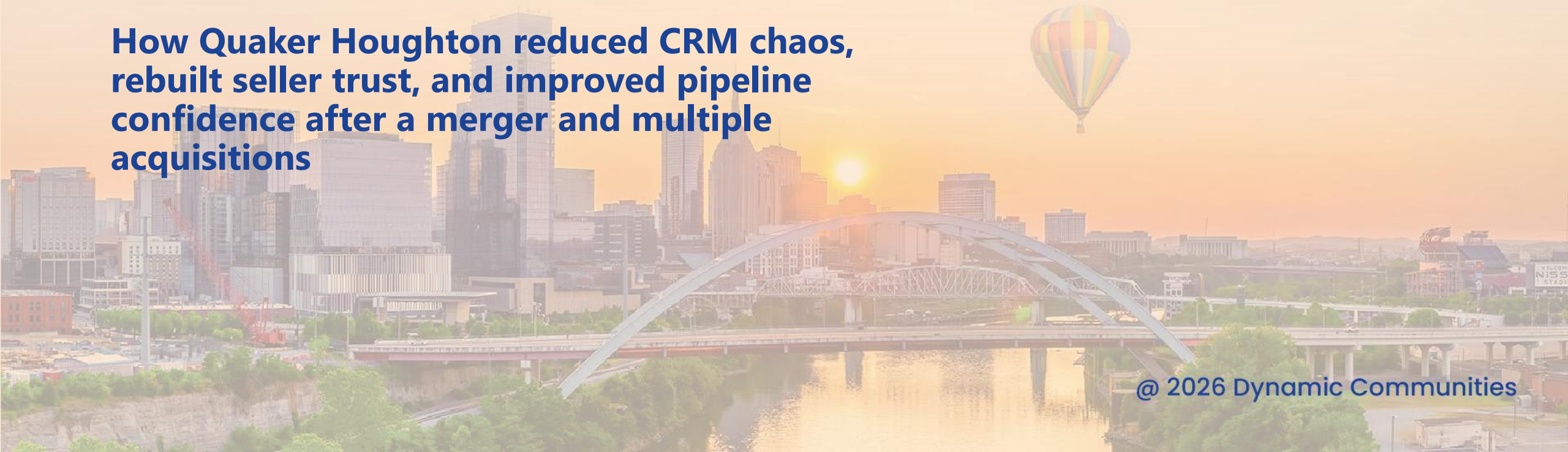
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Merger Mayhem to Clean Pipeline

How Quaker Houghton reduced CRM chaos, rebuilt seller trust, and improved pipeline confidence after a merger and multiple acquisitions



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Speakers



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Quaker Houghton



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Business Technology Solutions

Quaker Houghton

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Learning Objectives

1. Use Power Automate to enforce ongoing CRM hygiene at scale
2. Implement duplicate detection, business rules and required fields without damaging seller experience
3. Tie CRM data quality directly to pipeline accuracy and business outcomes

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Session Agenda

Today's Journey

- The Mess We Inherited
- How We Audited the Damage
- Duplicate Detection & Cleanup
- Business Rules & Data Standards
- Power Automate as a Hygiene Engine
- Governance That Sticks
- Business Results

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Merger Mayhem

Quick show of hands



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Mayhem #1



Photo: © Allstate Insurance

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Mayhem #1



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The merger context

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Quaker™ It's what's inside that counts. + HOUGHTON® Fluid Partnerships Making a World of Difference = Quaker Houghton™ Forward Together™

- On **August 1, 2019**, Quaker Chemical combined with Houghton International to form **Quaker Houghton**
- **Why CRM Became So Hard**
  - Merger
  - Multiple acquired businesses
  - Different CRM practices
  - Different data standards
  - Different account ownership models
  - Thousands of customers across globe



quakerhoughton.com



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The reality check

What we inherited

- 68,000 + accounts reviewed
- ~1,500-3,000 potential duplicate accounts
- Thousands of conflicting contacts
- Tens of thousands of missing key fields
- 22,000+ owned by inactive owners
- Hundreds of competing versions of the same customer
- Dozens of conflicting parent-child relationships

Result: Sellers stopped trusting the pipeline.

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The ending before we begin

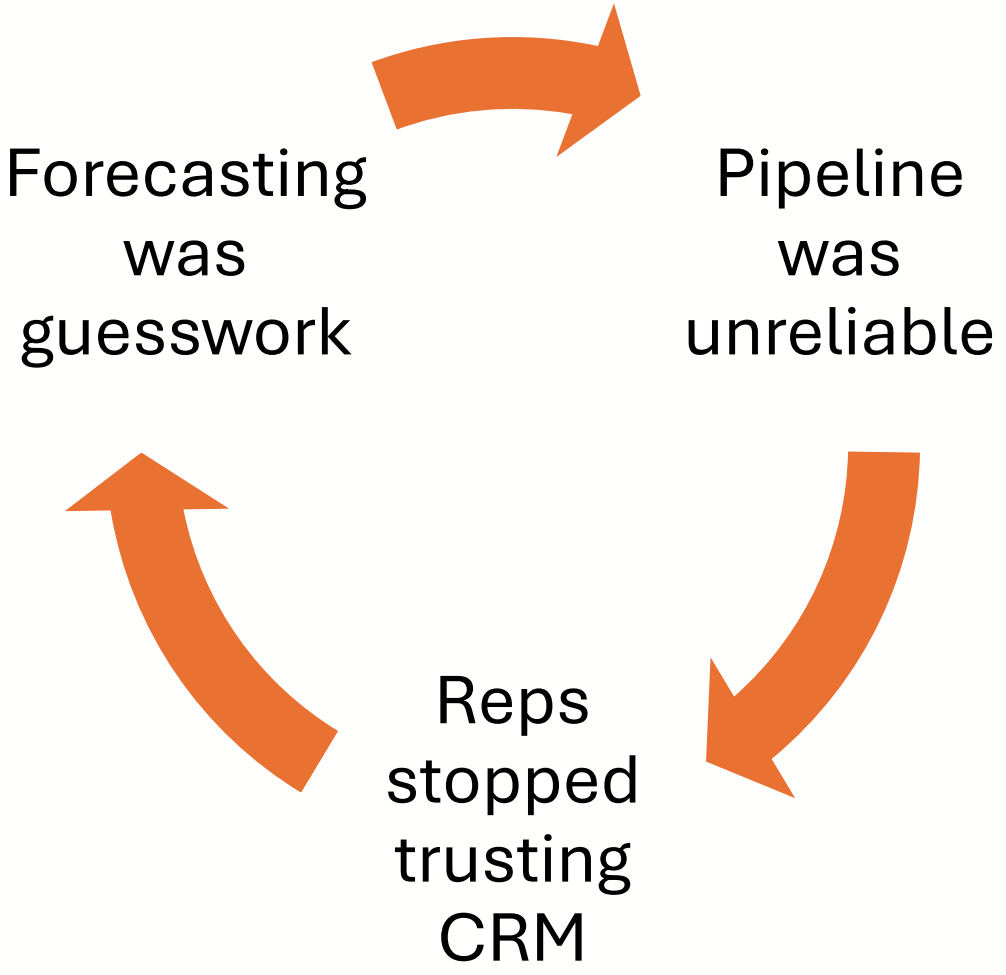
By the end of this journey, we achieved

- ✅ Cleaner account structure
- ✅ Better forecasting confidence
- ✅ Higher seller trust
- ✅ Stronger adoption
- ✅ Sustainable governance

Progress. Not Perfection. Still Progressing.

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Why it mattered



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The Audit



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Mayhem #2





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Before you fix anything, look at what you have

- Resist the urge to start deleting or merging right away
- The audit gives you a baseline – you'll need it later to tell the "before" story
- Get stakeholder alignment on what "good" looks like before you start
- Document everything as you go – screenshots, record counts, export dates

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Tools for auditing

Advanced Find

- Your best friend! Build queries to surface incomplete, duplicate-prone, or orphaned records

Views

- Look at what views already exist and what they are surfacing

Excel exports

- Pull records into Excel for volume analysis, spot checking and stakeholder reviews

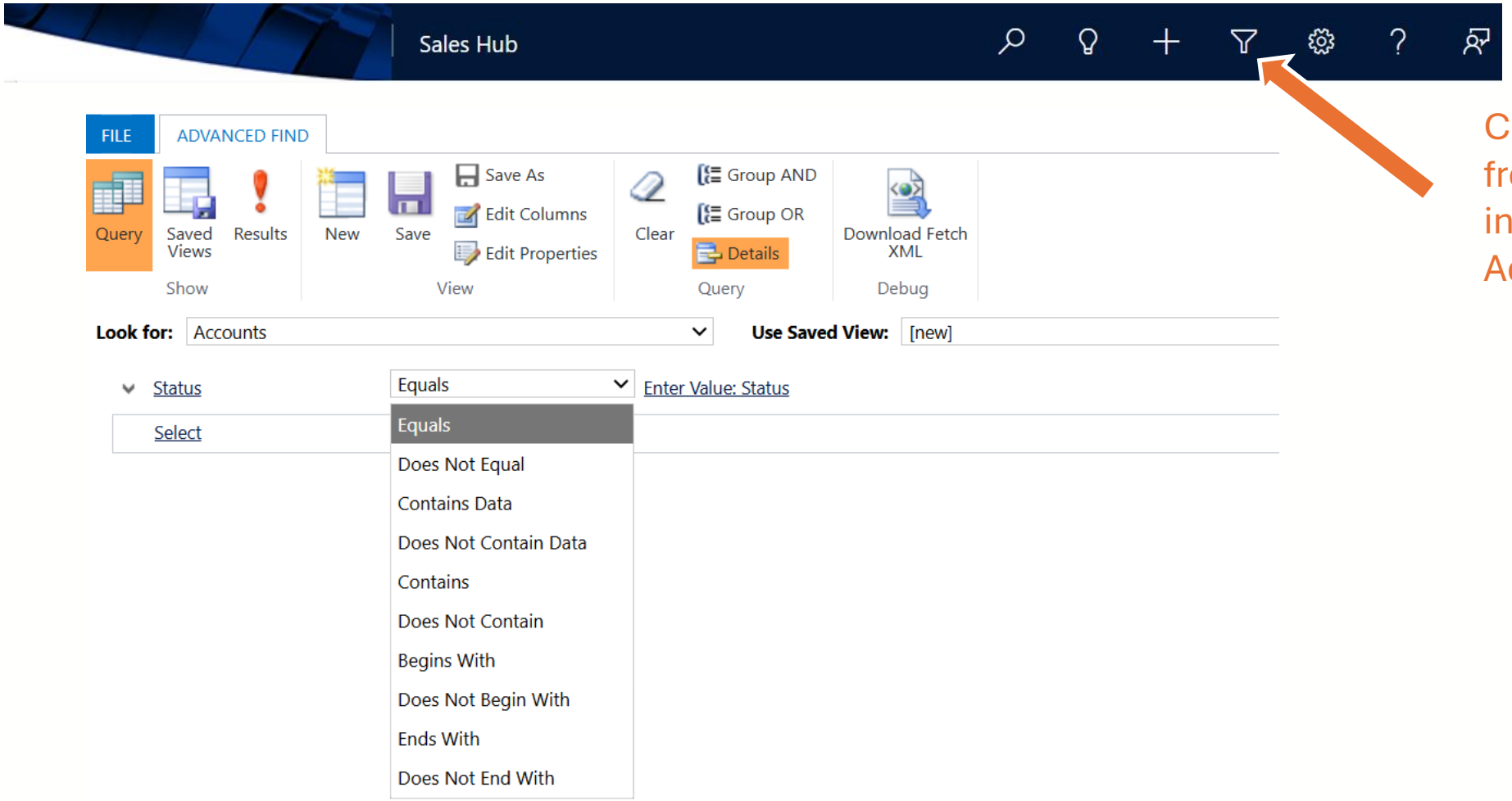
Record counts

- Who has the most records? Are they clean?
- Check last modified and created dates. How much of your data is stale?

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Advanced Find

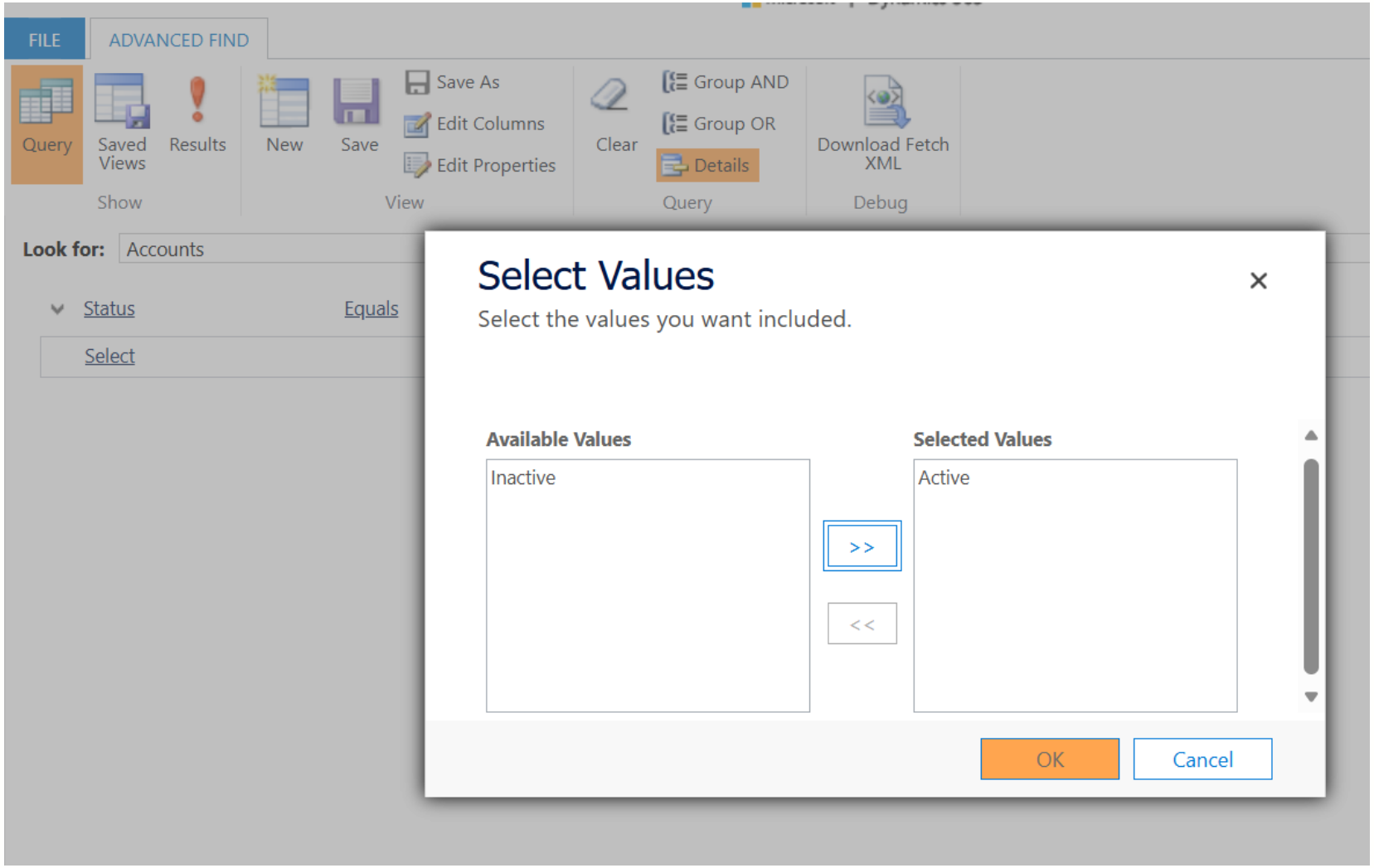
Let's find **Active Accounts in US and Canada with no contacts associated**



Click the funnel from any screen in CE to open Advanced Find

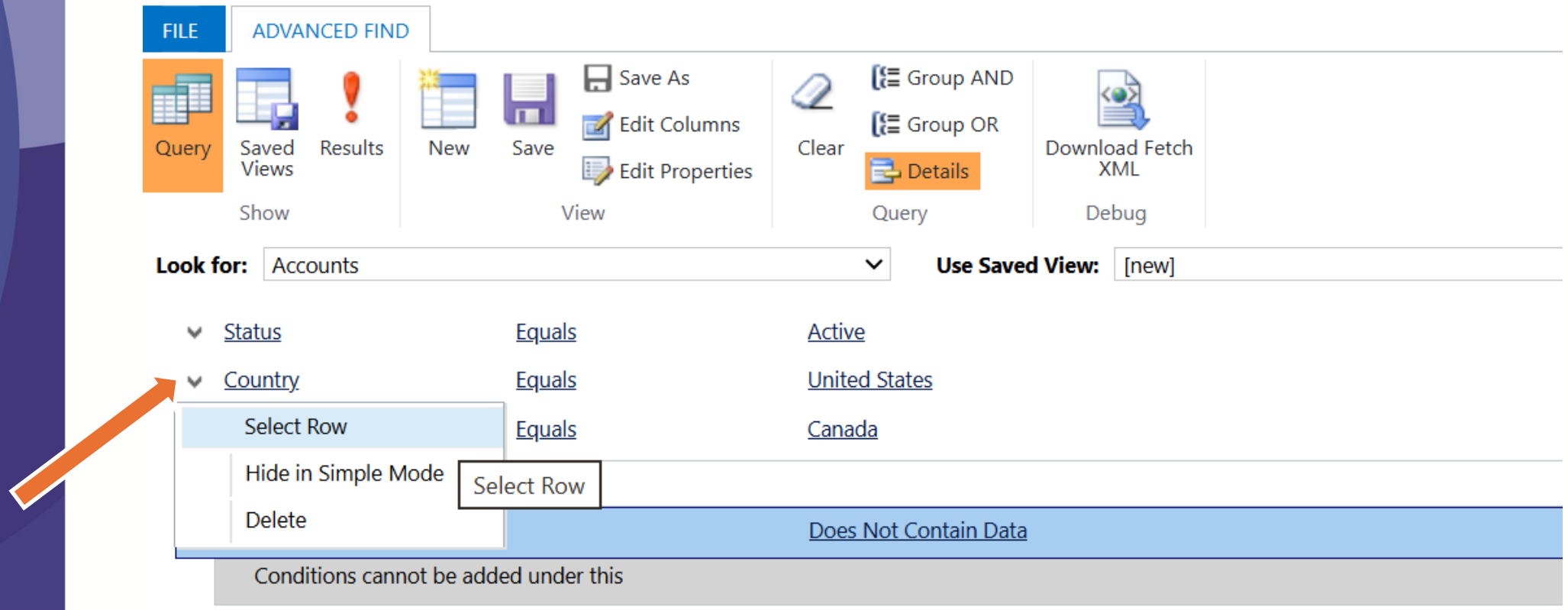
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Advanced Find



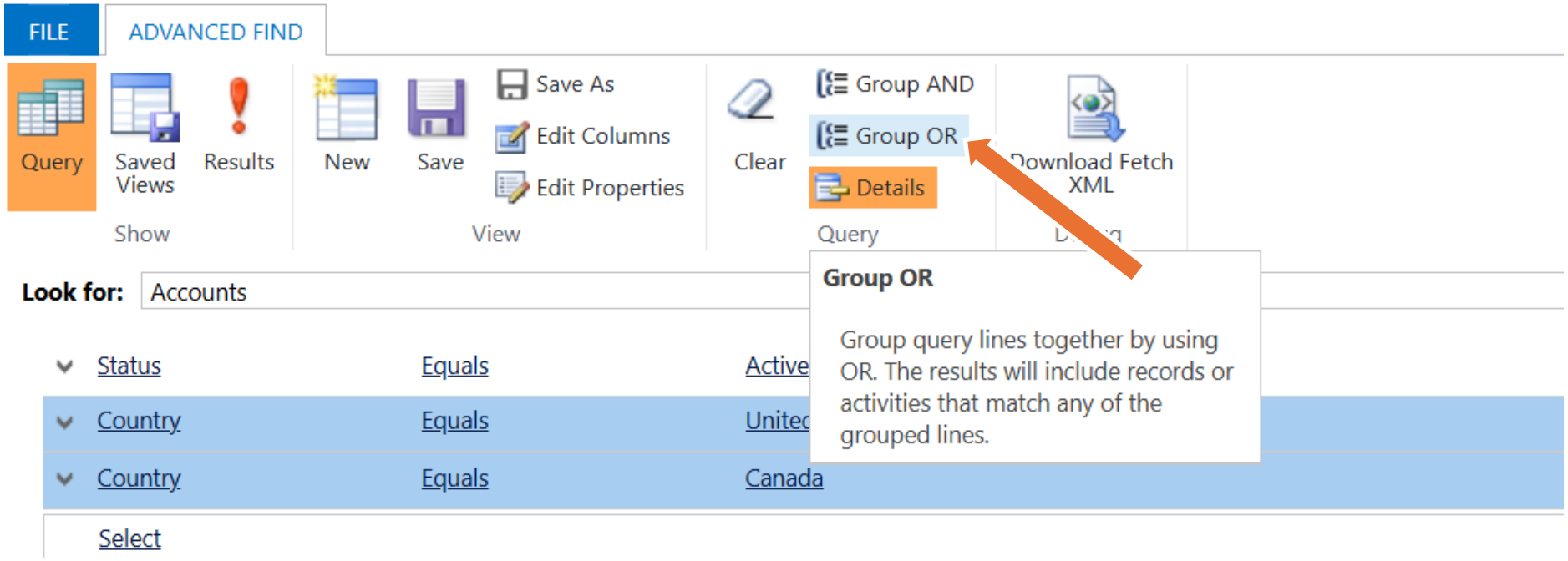
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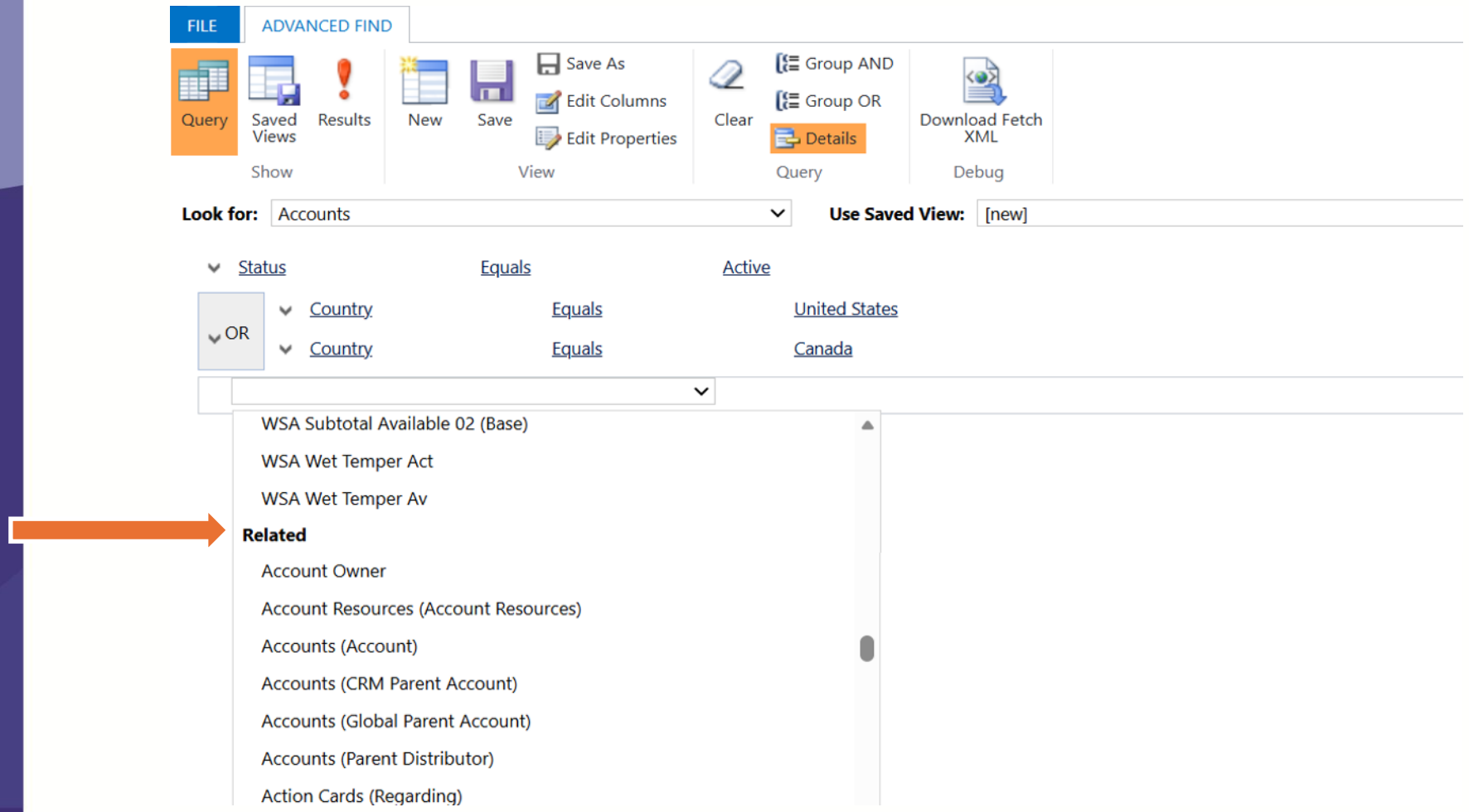
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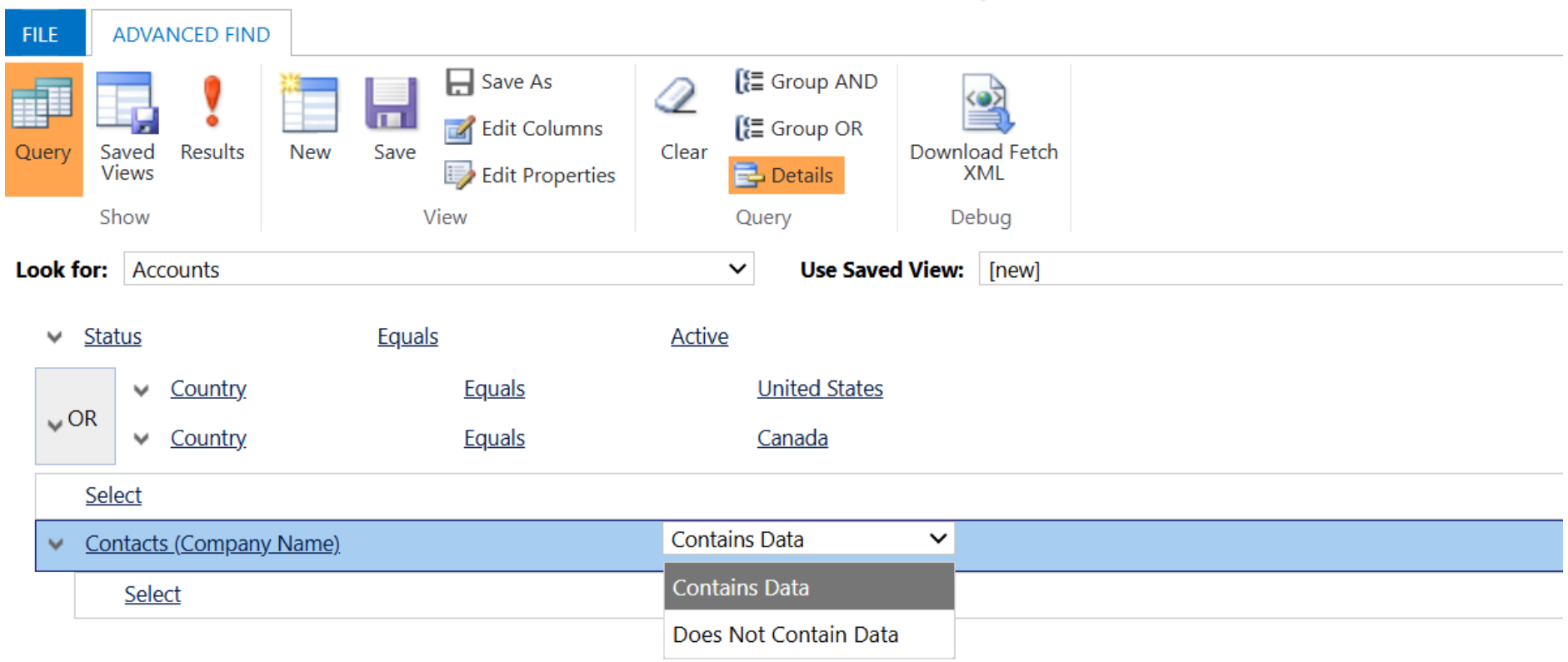
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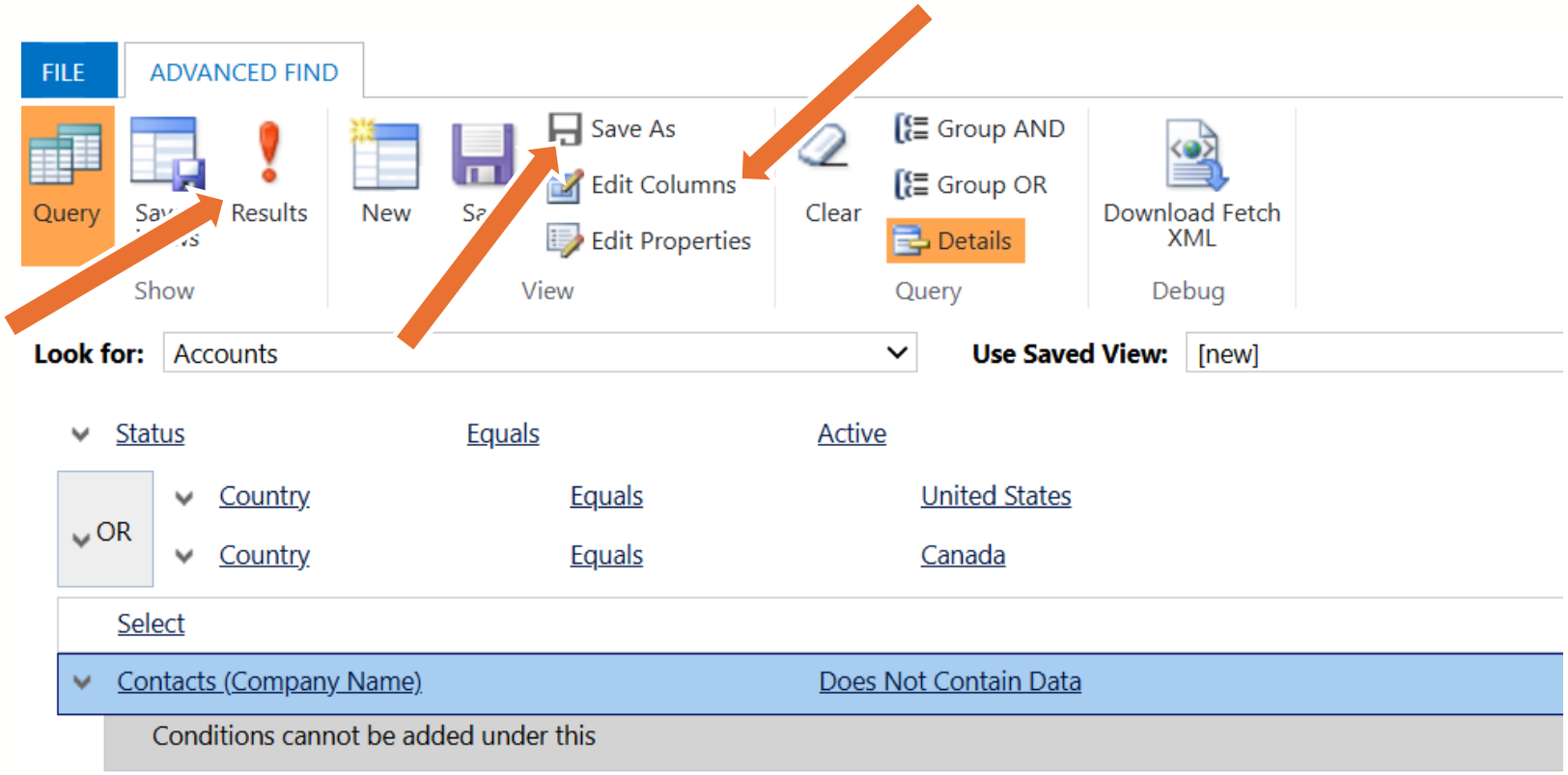
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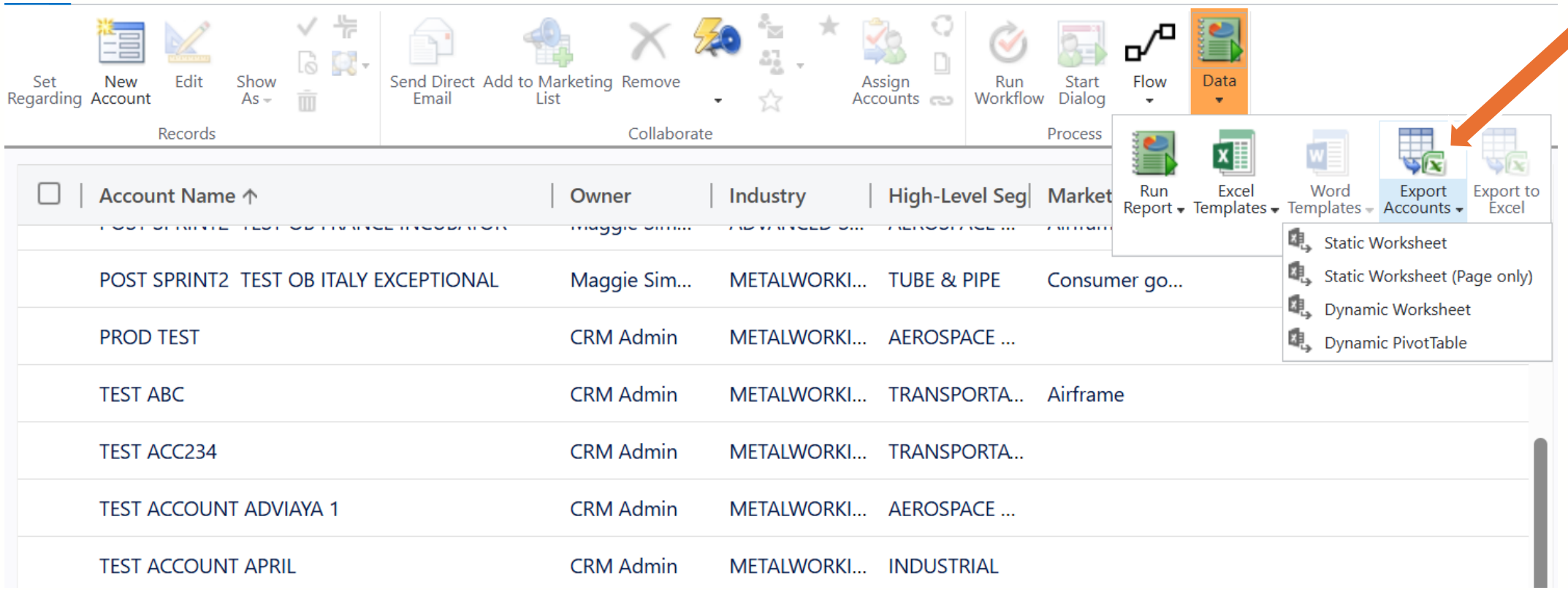
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Advanced Find



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Advanced Find



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What we found

	Pre-Mayhem Cleanup Estimates
Duplicate Accounts	~1,500-3,000
Missing Contacts	13% of Accounts had a Contact
Missing Other Key Data	45% No Segment
Outdated Accounts	56% > 2 Years
Inactive Owners	32% of Accounts
Opportunity data missing	60% of WON Opps had revenue estimates
Lead Tracking	49% of Leads were Cancelled; 9% Qualified
Fields not in use	Account table: 454 Custom Fields; 229 have data on <5% of accounts

Everyone had good reasons.
Nobody had common standards.

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Prioritizing the mess

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You can't fix everything at once – a triage approach keeps the project from stalling.

Tier 1: Fix Now Anything that directly breaks pipeline visibility	Tier 2: Fix Next Data that hurts reporting but doesn't block daily work	Tier 3: Fix Later or Retire Stale, Low Impact or Historical
Duplicate Accounts (sometimes with conflicting status	Inconsistent Pick Lists and Naming Conventions	Leads older that 18-24 months with no activity
Missing Owners on Opportunities and Leads	Incomplete contact records	Unused Custom Fields
Bad Opportunity Stages	Accounts owned by inactive users	Closed/Lost Opportunities with incomplete data
Product Data / Segmentation	Duplicate Contacts	Accounts with no activity in 2+ years
Opportunities missing close date or estimated revenue	Opportunities missing competitors or product lines	Notes and Activities

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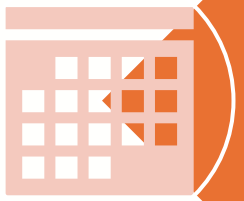
Tips for success

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Get **agreement** on triage priorities

- Involve sales leadership early so they co-own the decisions



Set a **realistic** timeline

- After you audit, evaluate the difficulty and volume of the fixes required



Communicate progress

- A simple tracker shared with stakeholders builds confidence

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Mayhem #3





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Duplicate Detection



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Why duplicates are a pipeline killer

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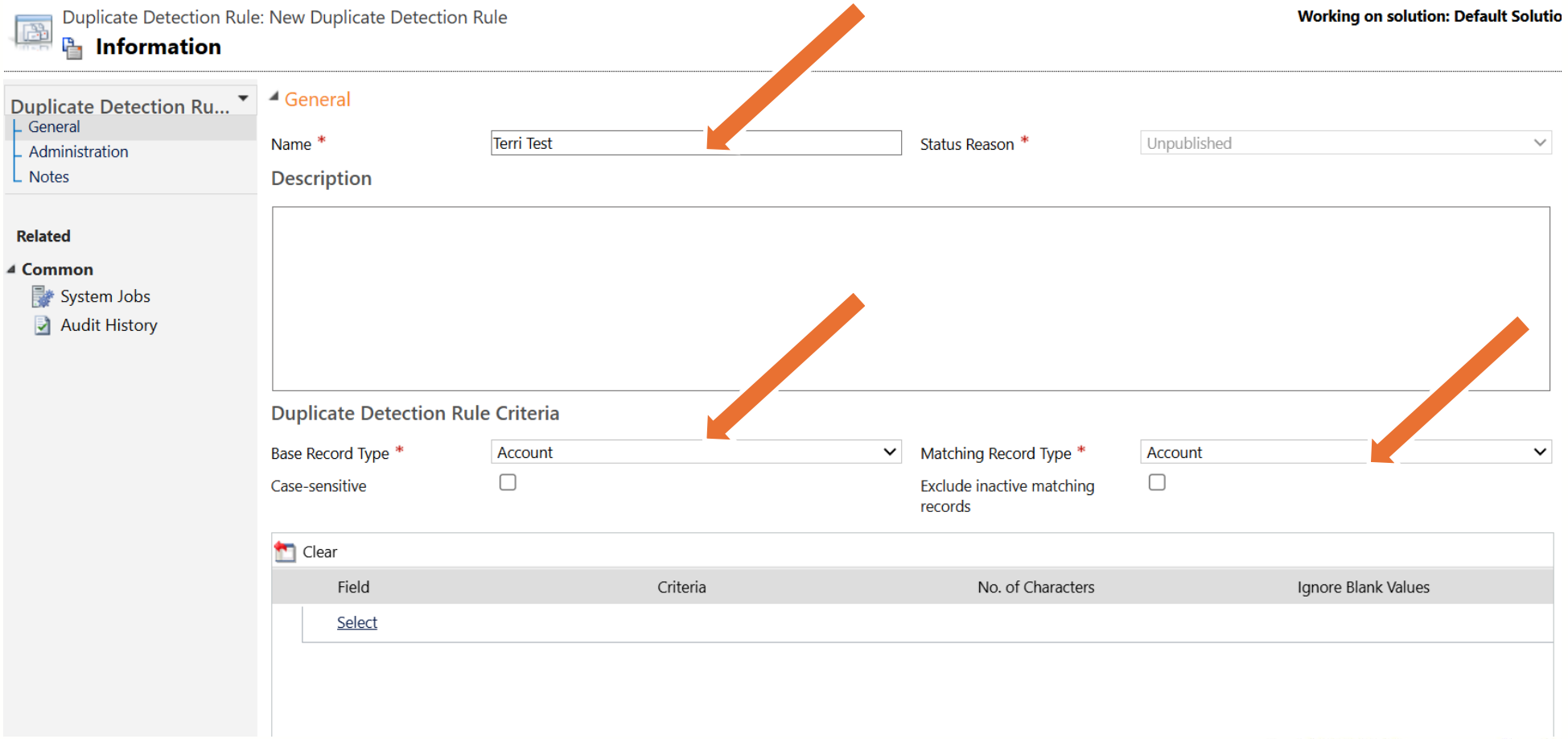
Duplicates aren't just an annoyance – they have real business consequences.

- Forecasting becomes unreliable when the same opportunity appears under two accounts
- Leadership loses confidence in CRM reports when they spot obvious duplicates
- Reps stop logging activity because "I don't know which record is the real one"
- Duplicate contacts mean marketing emails go out twice



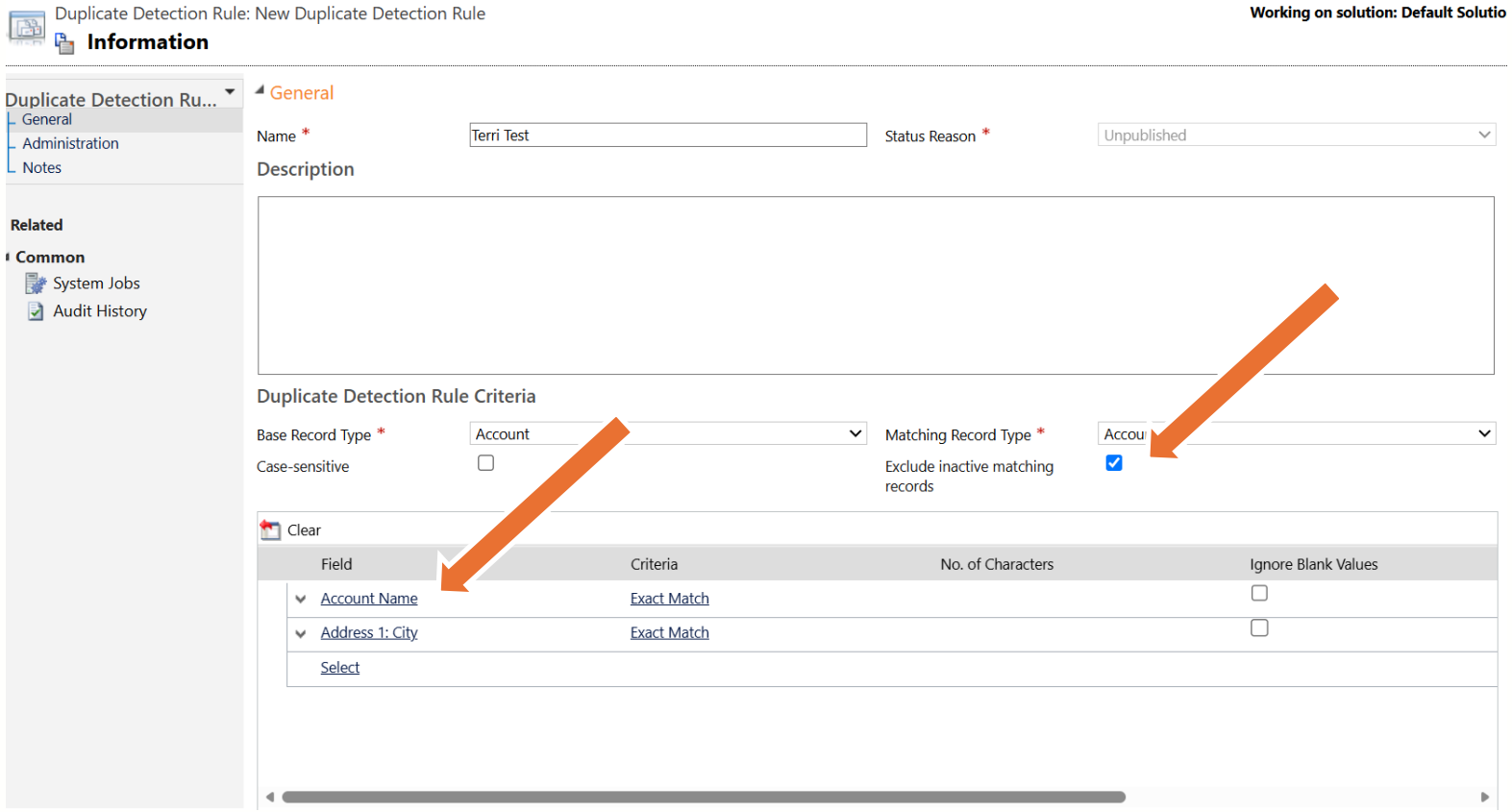
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Configuring Duplicate Detection rules in D365



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Configuring Duplicate Detection rules in D365



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Merge Accounts

Choose data from the fields to combine the records into a single primary record. Selecting a section header value will also select any fields in that section. Please review before merging.

☐ Merge records by choosing fields with data ☑ View fields with conflicting data

☑ Enable parent check

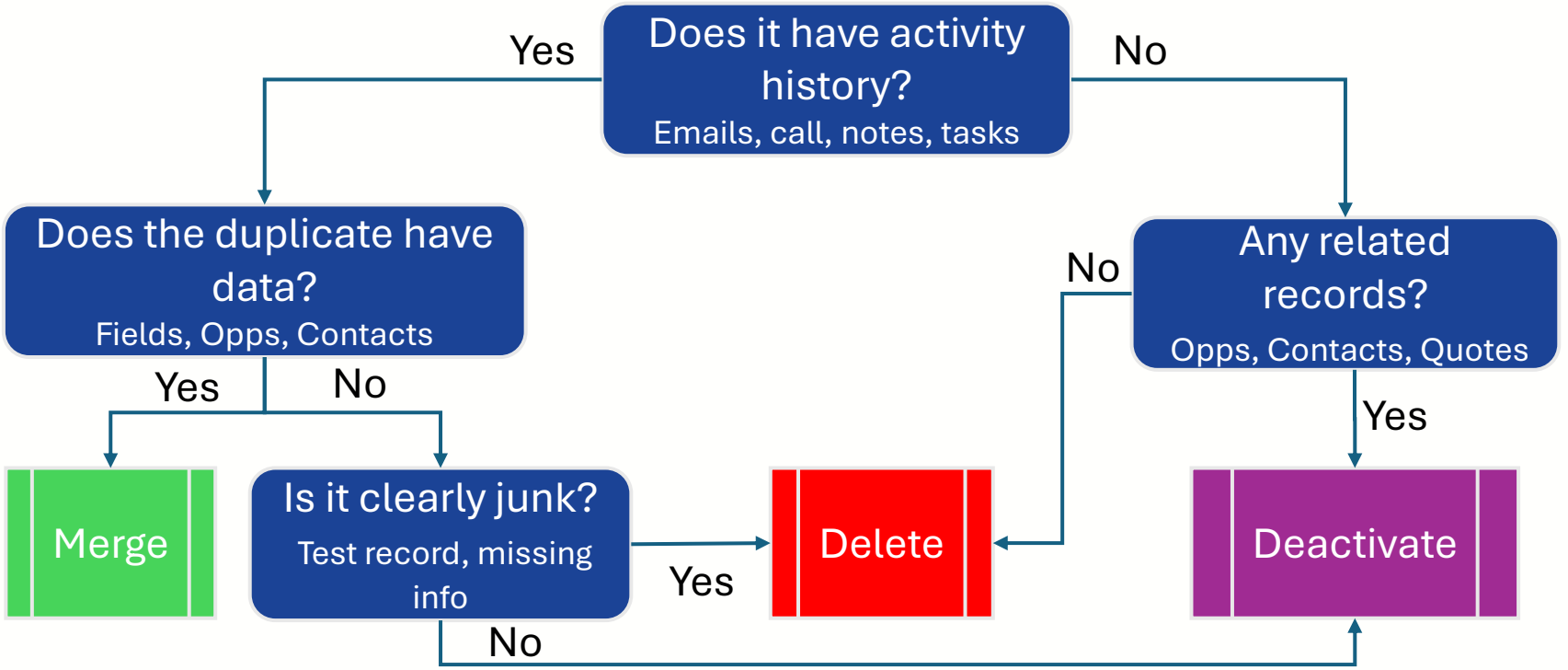
	Matched record	Current record
	TEST SA	TEST SA
ACCOUNT INFORMATION	Select all fields in this section	Select all fields in this section
Customer Offer Level	Strategic	Transactional
Currency	BRL	USD
SEGMENTATION	Select all fields in this section	Select all fields in this section
High-Level Segment	AEROSPACE & DEFENSE	NON FERROUS
BILLING	Select all fields in this section	Select all fields in this section
Account Resources	Select all fields in this section	Select all fields in this section

OK Back

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Merge vs. Deactivate vs. Delete

Not all duplicates are handled the same way. Having a decision framework saves a lot of debate.



Merge Gotchas to Check

Which child record wins?	Opps on both records?	Custom field values?
Verify before accepting	Manual cleanup often needed	Test merge behavior first

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Lessons learned

- **Don’t run bulk detection on everything at once**
  - Start with one entity and get your process right before expanding
- **Get a second pair of eyes before merging**
  - Especially on accounts – what looks like a duplicate sometimes isn’t (two locations of the same company, a parent child relationship, etc.)
- **Document your rules and the decisions behind them**
  - Six months later, no one will remember why you matched on those specific fields
- **Duplicate detection is not a one-time project**
  - Build it into your governance model from day one or you will have to do this again (we did)
- **The merge tool has limits**
  - For complex or high-volume scenarios, you may need a third-party tool

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Business Rules & Field Requirements



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The “Garbage In” problem

Bad data doesn’t happen because people are careless. It happens because the system allows it.

- Post-merger you have two teams with two sets of habits
- When there’s no enforcement, people default to what they know
- Classic examples:
  - Industry field: “Mfg”, “Manufacturing”, “MFG-Industrial”, “manufacturing”
  - Phone format: 610-555-1234, 6105551234, +1-610-555-1234, 610 555-1234
  - Lead source: “Other” (for >50% of your leads)

The Cost



- Reports you can’t trust
- Segments you can’t build
- Forecasts that are guess work

Photo: © Allstate Insurance

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Business rules we implemented

Business rules are your first line of defense. They enforce logic without needing a developer.

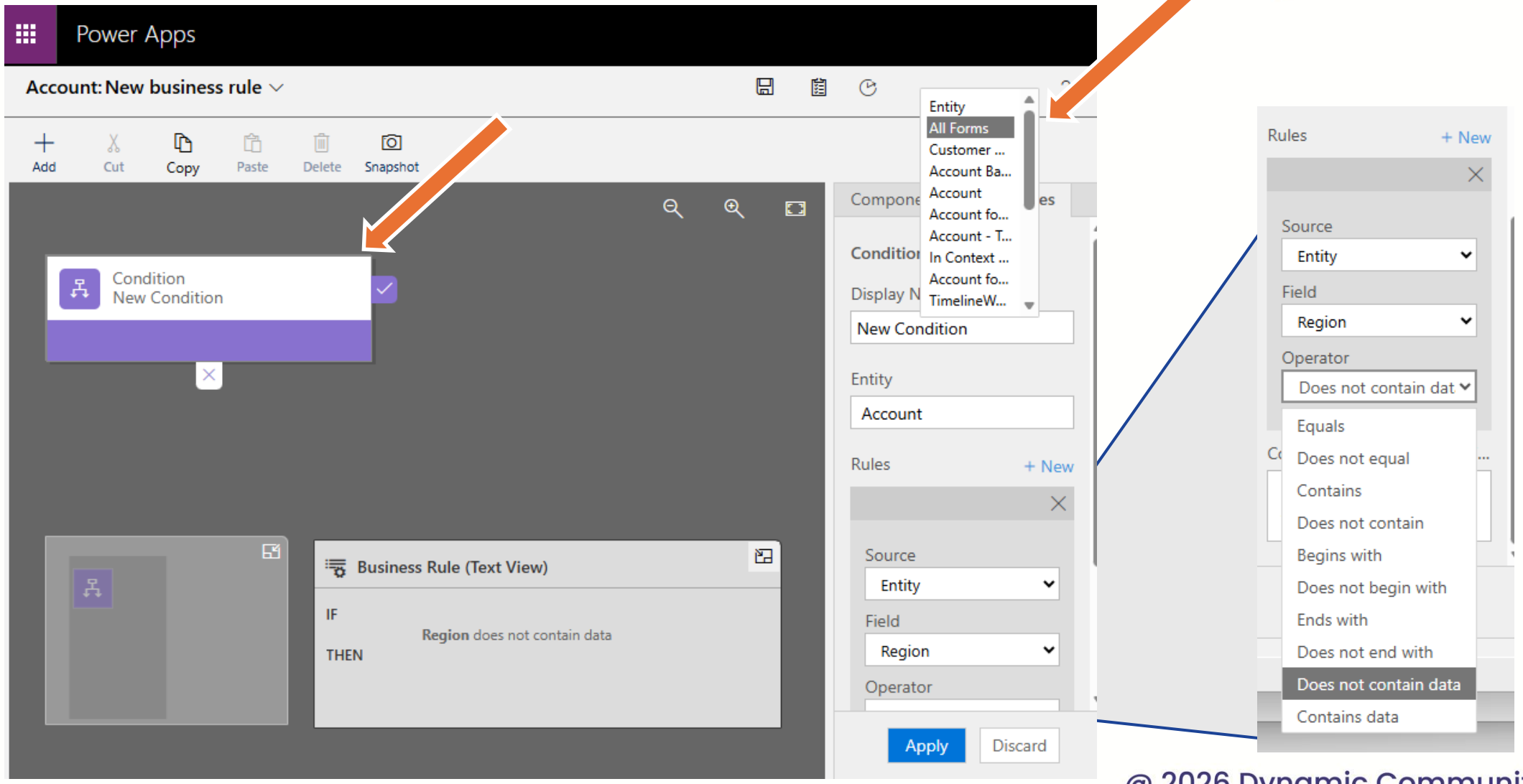
Native Functionality in CRM	Examples
Show/hide fields based on other field values *on the current entity*	If Existing Account = Yes, hide irrelevant fields to reduce clutter
Lock fields once a certain stage is reached	Revenue field locked once opportunity is Closed Won
Set default values automatically	Set the industry value by default based on the Opportunity form in use
Display error messages or recommendations inline	Warning message if estimated revenue is left at $0
Make fields required conditionally	Close date required once opportunity stage = Proposal or later

Limitations:

The scope of the rule can be customized to target a specific form, all forms or the entire table.
Business Rules fire only on save, not on existing records.
Complex logic requires Power Automate or plugins.

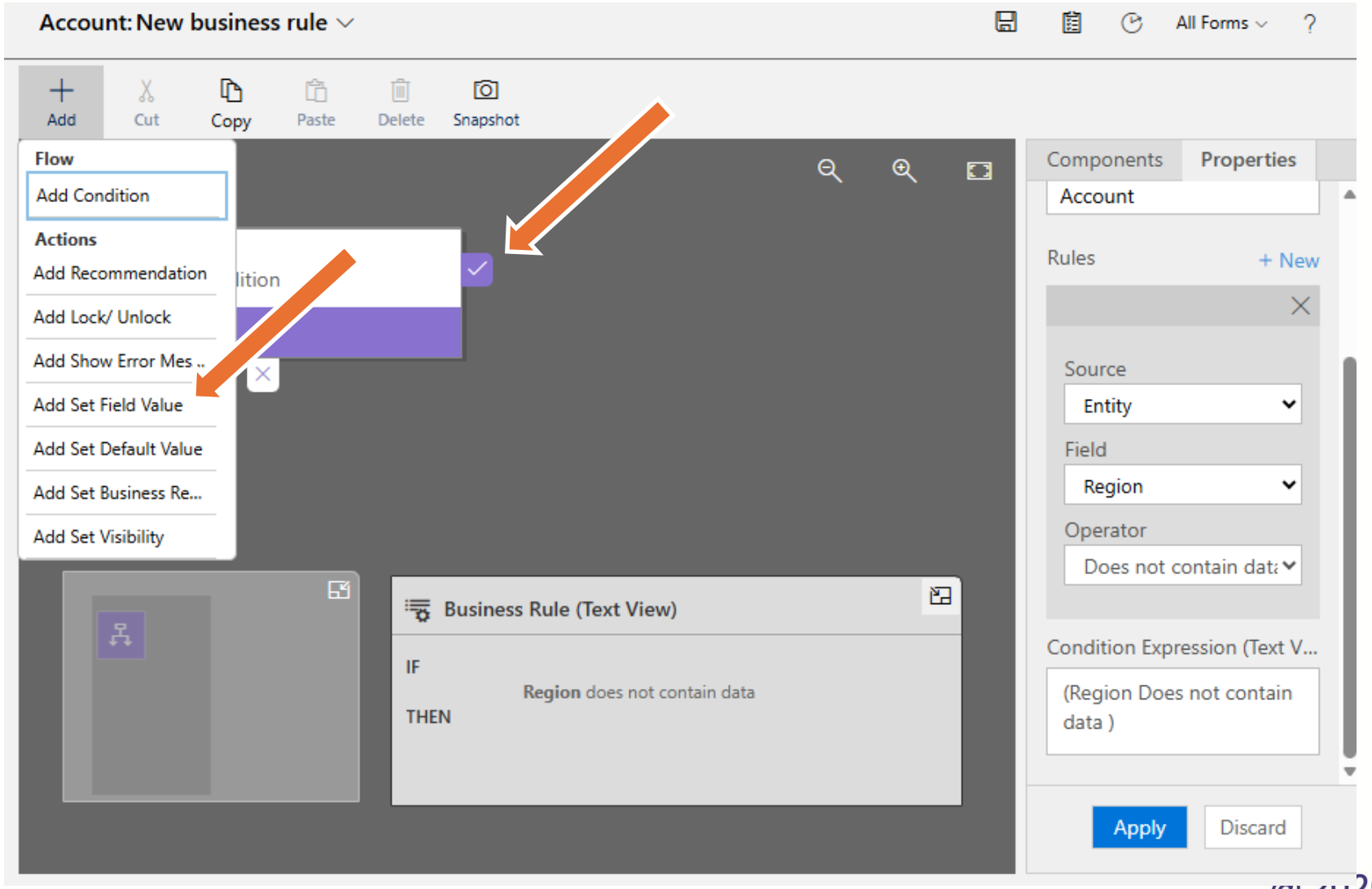
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Business Rules demo



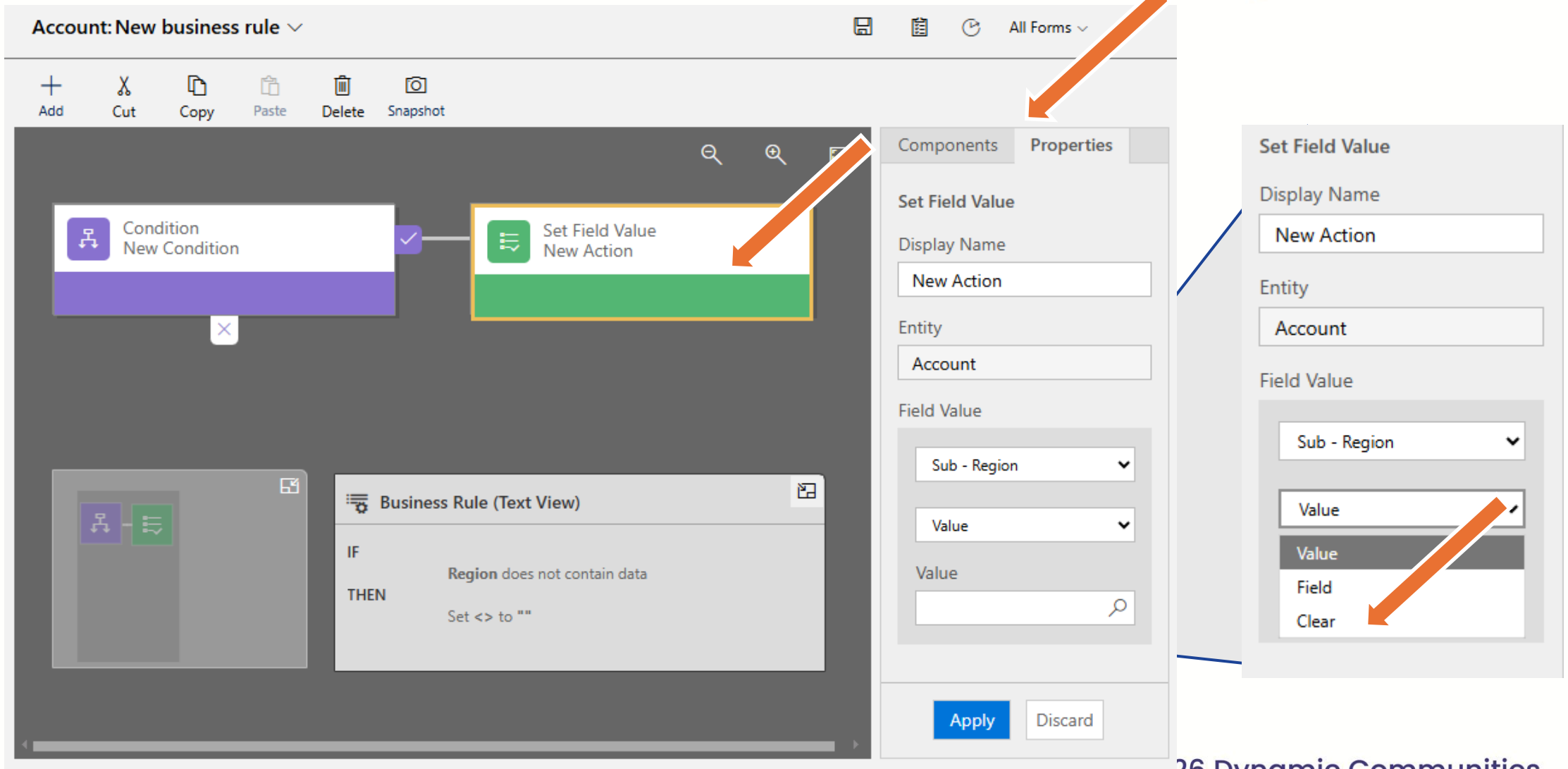
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Business Rules demo



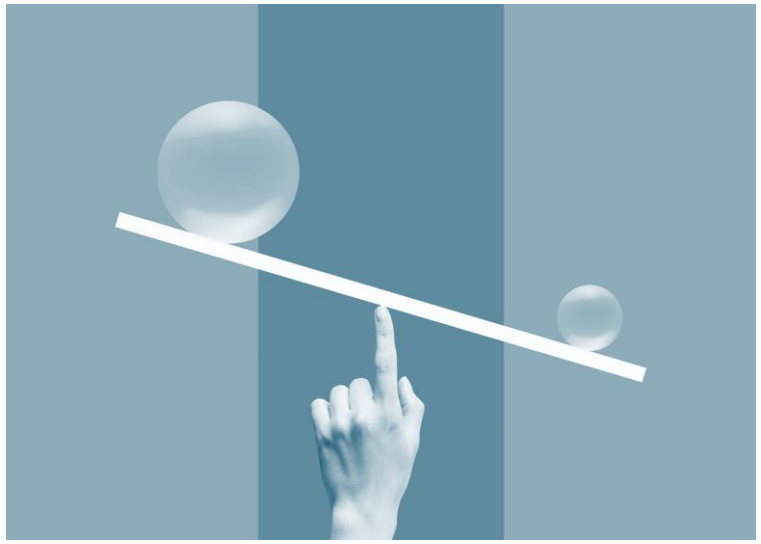
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Business Rules demo



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Balance enforcement with usability



- Enforce only critical fields (Email, Account, Owner
- Use automation for secondary completeness checks
- Avoid blocking saves for non-critical data
- Replace hard stops with soft nudges (notifications, dashboards
- Review rules quarterly with sales feedback
- Measure tolerance by adoption, not complaints

Enforce what matters most,
Automate what can be fixed, and
Educate for everything else

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Power Automate



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Automation as a hygiene layer

Power Automate is the enforcement arm that runs 24/7 when nobody's looking.

- **Invisible enforcement:** Power Automate validates and corrects data behind the scenes.
- **Continuous hygiene:** Scheduled flows catch missing or invalid fields daily.
- **Non-disruptive:** Reps aren't blocked — issues are fixed or flagged automatically.
- **Smart nudges:** Notifications prompt updates instead of hard stops.
- **Governance at scale:** Automation enforces rules across forms, imports, and integrations.
- **Feedback loop:** Dashboards show hygiene trends and trigger improvement actions.



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The flows we built

Category	Flow Example	Purpose
Ownership & Routing	Auto-assign owner based on region, product line, or lead source.	Ensures every record has an accountable owner immediately.
Data Completeness	Flag incomplete records (missing email, phone, or parent account.)	Sends an e-mail alert for cleanup.
Stale Data Management	Notify on stale records (no activity in 30 days.)	Prompts reps to re-engage or close out inactive leads.
Data Hygiene Reminders	Weekly summary email of incomplete or stale records per rep.	Encourages self-correction without admin intervention.
Governance Dashboard Feed	Push flow results into Power BI for hygiene metrics.	Tracks trends in completeness, duplicates, and stale data.
Lifecycle Automation	Auto-close inactive leads after 90 days with no updates.	Keeps pipeline current and forecasting accurate.

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Keeping flows manageable & maintainable



- **Name your flows like they are documentation** – Use a standardized naming convention like [frequency or trigger] – [what it checks] – [what it does]
- **Document flows outside of Power Automate** – Include purpose, trigger, owner, last modified date, dependencies
- **Define ownership** – Ensure each flow has a responsible person or team that is accountable
- **Built in error handling & alerts** – Does anyone know the flow failed? What happens if it does?
- **Performance monitoring** – Track run counts, failures, and execution time

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What we automated vs. what stayed manual

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What We Automated

- **Notifications and Nudges:** anything time-sensitive that a human would forget
- **Flagging and Detection:** Surfacing problems without requiring someone to run a report
- **Simple Field Standardization:** Known value mapping with no ambiguity
- **Scheduled Hygiene Checks:** Daily/weekly sweeps without having to remember to do them

What Stayed Manual

- **Record Merges:** Too much judgement required
- **Deactivations and Deletions:** Always a human decision with an audit trail
- **Complex Data Corrections:** Anything requiring context that a flow can't read

If the correct action requires human judgment, automate the ***detection*** but keep the ***action*** manual.

The flow finds it; a person fixes it.

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Governance Policy



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The human side of clean data

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Tools only go so far

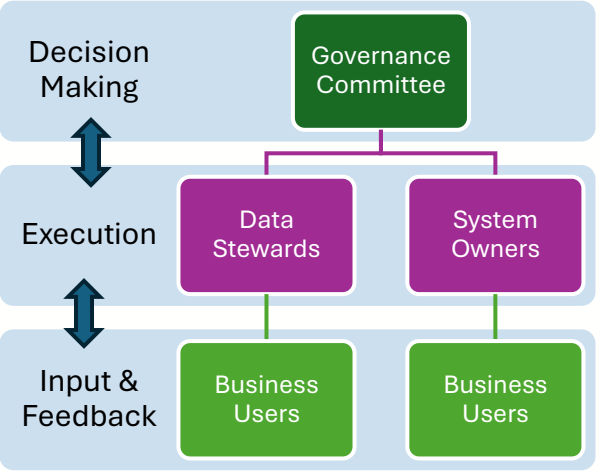
- Clean data requires clear ownership
- If everyone owns the data, nobody owns the data
- Make it easier to do the right thing than the wrong thing
- Explain the "why," not just the rule
- Celebrate quality improvements, not just compliance
- Governance is a process, not a project

Bottom line: Data quality is sustained through **habits**, **accountability**, and **leadership support**.

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Our governance model

- **Data Quality Ownership**
  - Business operations own day-to-day data hygiene
  - System admins enforce technical standards
  - Governance committee reviews metrics quarterly
- **Change Management**
  - New fields or logic changes require documented business justification
  - Review for duplication, naming consistency, and downstream impact
  - Approved changes logged in a central schema tracker
- **Governance Structure**
  - Cross-functional committee (Ops, Sales, Marketing, IT)
  - Defined roles: *Data Steward*, *System Owner*, *Process Owner*
  - Monthly sync for alignment and backlog review
- **Guiding Principles**
  - Transparency over control
  - Standardization before customization
  - Impact assessment before implementation
  - Continuous feedback loop with end users



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Getting buy-in

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Start with empathy: Frame governance as support, not restriction.

Show quick wins: Highlight visible improvements (clean dashboards, faster routing).

Connect to outcomes: Tie data quality to revenue, forecasting, and customer trust.

Involve reps early: Pilot rules with field feedback before rollout.

Celebrate adoption: Recognize teams that improve data hygiene.

Leadership alignment: Use metrics to show ROI on governance.

Continuous communication: Keep governance updates transparent and two-way.

Make it cultural: Embed data quality into onboarding and performance reviews.

"**Governance** isn't control - it's **enablement**."

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Lessons learned about governance

- Agree on a single source of truth
- Define who owns Accounts, Contacts, and Territory data
- Resolve process differences before migrating data
- Train users on new standards and expectations
- Establish ongoing stewardship reviews
- Don't assume users will adopt new standards automatically
- Don't let legacy business units keep conflicting practices

Most data issues reappear when process and accountability aren't addressed

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The Payoff



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Pipeline metrics before vs. after

Metric	Pre-Mayhem Cleanup Estimates	Post-Merger / Continuing Mayhem
Duplicate Accounts	~1,500-3,000	430
Missing Contacts	13% of Accounts had a Contact	40% of Active Accounts have a Contact
Missing Other Key Data	45% No Segment	2.1% of Active Accounts with No Segment
Outdated Accounts	56% > 2 Years	100% Active; > 2 Years = Inactive
Inactive Owners	32% of Accounts	99.3 % of Active Accounts
Opportunity data missing	60% of WON Opps had revenue estimates	90% of WON Opps have revenue estimates
Lead Tracking	49% of Leads were Cancelled; 9% Qualified	4% Cancelled; 29% Qualified
Fields not in use	Account table: 454 Custom Fields; 229 have data on <5% of accounts	The Mayhem Continues…

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What changed for reps

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Before	After
• "Which account is the right one?" • Multiple contacts for the same person • Incomplete customer history • Unreliable reports • Low confidence in CRM data	• One trusted customer record • Cleaner contact data • Better account insights • Accurate reporting • Time saved • Greater user confidence

The biggest win wasn't cleaner data.
It was giving reps confidence that the information in Dynamics was trustworthy.

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What changed for leadership

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Revenue & Pipeline Visibility

- Win/Loss Data
- Deal Velocity
- Core Product Offering

Credibility & Culture Shifts

- From Admin Burden to Business Asset
- Future Investment in System
- Planning Input for Budget

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Your D365 CRM Cleanup Playbook

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Phase 1: Audit First

- ❑ Run Advanced Find queries to surface incomplete and orphaned records
- ❑ Export record counts by owner and last-modified date
- ❑ Document your starting baseline
- ❑ Triage into Tier 1/2/3 before touching anything
- ❑ Get stakeholder sign-off on what "good" looks like

Phase 2: Tackle Duplicates

- ❑ Configure duplicate detection rules for Accounts, Contacts and Leads first
- ❑ Run bulk detection jobs on existing records. Don't just catch new ones
- ❑ Apply the Merge / Deactivate / Delete framework. Never self-serve deletes.
- ❑ Verify custom field merge behavior before committing at scale
- ❑ Document your matching rules – you *will* forget why you chose them.

Phase 3: Business Rules & Fields

- ❑ Audit your forms. Identify unused, duplicate and legacy fields.
- ❑ Remove or hide fields before adding any new requirements
- ❑ Add required fields only where they feed reports, dashboards or forecasting
- ❑ Use conditional visibility to show fields only when they are relevant
- ❑ Lock fields after stage milestones to prevent retroactive edits
- ❑ Pilot with one team before full roll out

Phase 4: Automate Hygiene

- ❑ Build a daily flow to flag orphaned records with no owner
- ❑ Setup a weekly stale opportunity nudge for reps
- ❑ Automate picklist value standardization for known legacy values
- ❑ Name every flow: [Frequency] – [What it checks] – [What it does]
- ❑ Add error handling to know when a flow fails before your data does
- ❑ Test in sandbox with real data. Limit initial runs to a small record set

Phase 5: Governance

- ❑ Name a CRM owner and a business-side data steward. Not just "the IT team"
- ❑ Require written approval for new fields, picklist value and bulk changes
- ❑ Publish a one-page rep guide: what's required, who to call, what to do with duplicates
- ❑ Run a monthly data quality scorecard and share it with leadership
- ❑ Involve a sales rep in the design. Let early adopters become advocates

Ongoing – Don't Let it Drift

- ❑ Re-run duplicate detection jobs quarterly.
- ❑ Review your flows every 6 months
- ❑ Tie data quality wins to business outcomes reps and leaders care about
- ❑ Revisit required fields if widespread workarounds appear



Automate the ***detection***. Keep the ***action*** manual wherever judgement is required.

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Avoiding the mayhem



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