

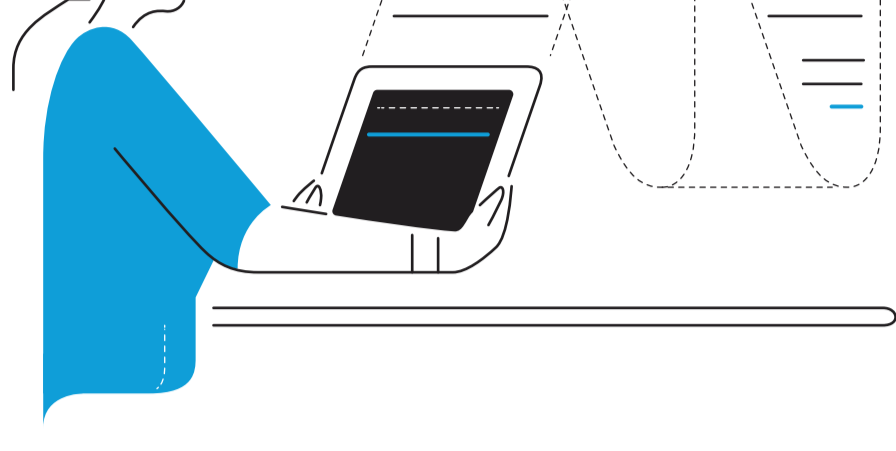
Say Goodbye to Dirty Data: Your 10-Step Checklist for Spotless Customer Records

Dirty data—incomplete, outdated, duplicate, or inconsistent consumer or business data—can create significant challenges for your business. It can lead to poor customer experiences, wasted sales and marketing efforts, inefficient operations, poor decision-making, compliance risks, and even make essential tools like your CRM ineffective.

But it doesn't have to be that way.

Use this straightforward checklist to learn the most impactful steps you can take to keep your data clean and pristine.

Schedule Regular Data Audits 1



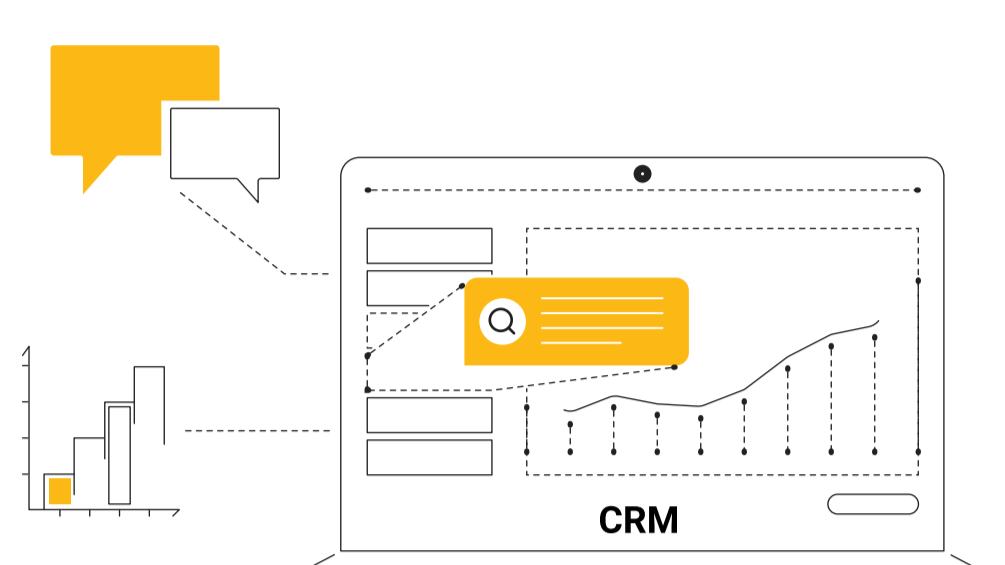
Set a Recurring Schedule: Establish a routine for data audits, whether it's monthly, quarterly, or semi-annually, depending on your data volume.

Assign Responsibility: Designate a team member or team to track, perform, and report on every data audit.

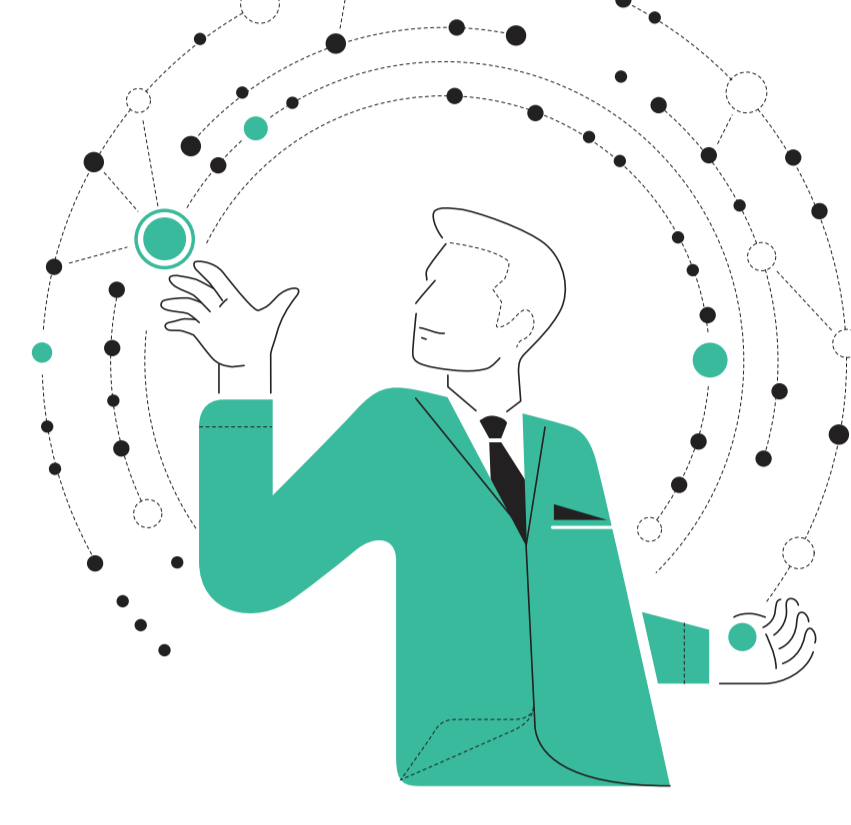
Identify and Remove Duplicate Records 2

Use De-Duplication Tools: Leverage CRM tools or specialized software to identify, merge, or delete duplicate entries.

Perform Manual Reviews: Every time you access a record, practice doing a quick manual review to ensure accuracy, particularly for high-value customers.



Standardize Data Entry Formats 3



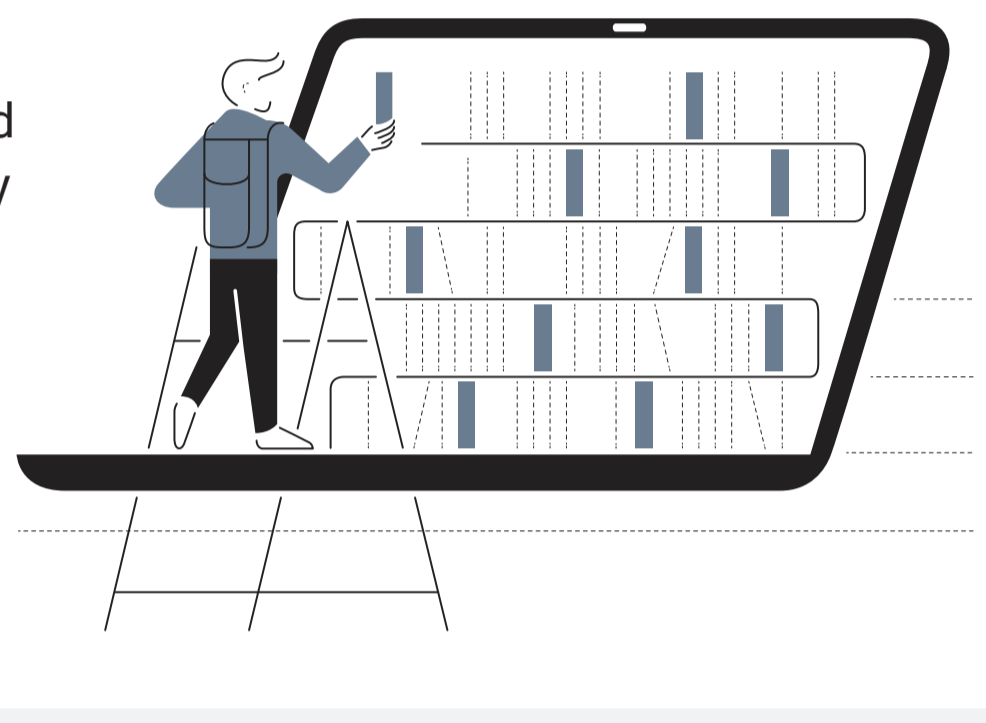
Create Data Entry Guidelines: Develop and enforce standardized rules and formats for data entry, such as consistent use of titles, phone number formatting, and address abbreviations.

Automate Formatting: Take standardization efforts one step further by implementing tools that automatically enforce your standards during data entry, saving you hours of time and energy.

Verify Contact Information 4

Perform Email Verification: Use email verification tools to identify and correct invalid or outdated email addresses. If you frequently add new contacts, send marketing emails often, or have a large list size, you should consider doing this more often.

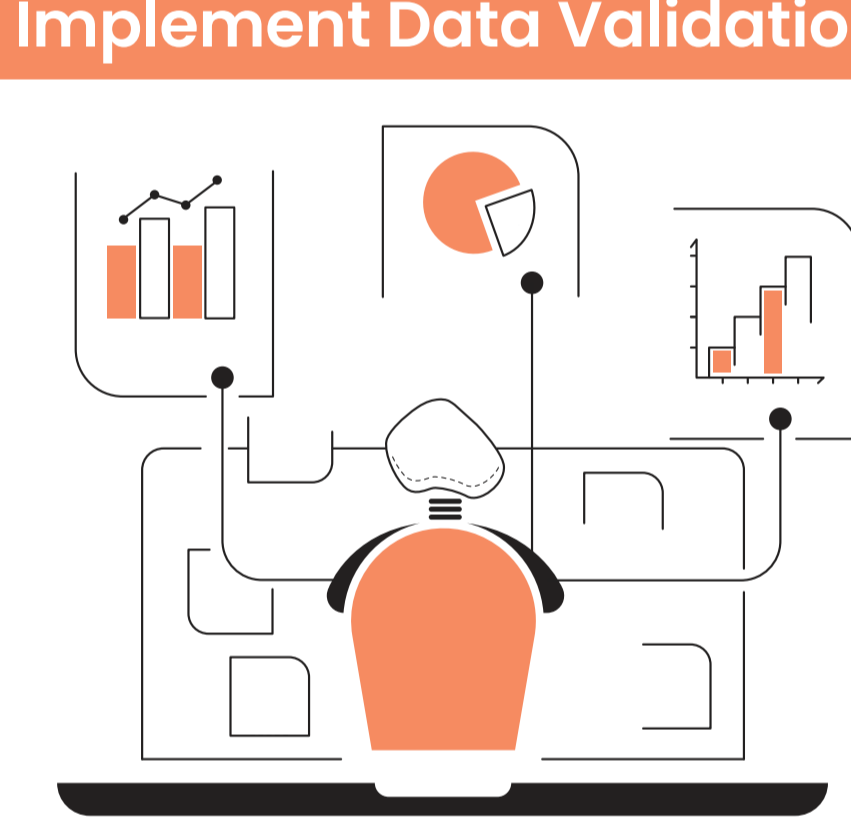
Phone Number Validation: Regularly check and update phone numbers using automated validation tools or by calling contacts directly.



Validation vs Verification: What's the difference?

Data Validation	vs	Data Verification
Avoid incorrect data input	MAIN GOAL	Verify data is correct
Ensures data follows format rules	WHAT IT IS	Confirms data matches original info
To prevent errors during entry	WHY IT'S DONE	To ensure data is accurate
During data entry	WHEN IT HAPPENS	After data is collected
Checking a phone number has the right number of digits	EXAMPLES	Comparing data to original records
Using built-in tools in CRM or other platforms	HOW IT'S DONE	Manual review or using comparison tools

Implement Data Validation Processes 5



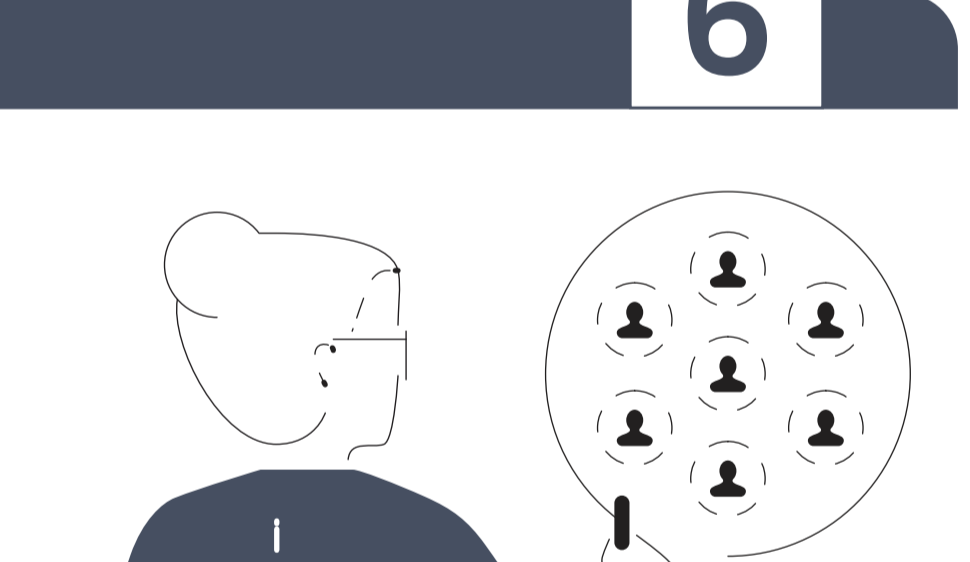
Automate Real-Time Validation: Use your CRM's built-in tools or custom scripts to automate data validation for all new data entries. This helps reduce errors, streamline data entry, and improve overall data quality.

Run Periodic Checks: If you don't manually check data every time you access a record, schedule dedicated time to catch and correct issues by hand and ensure the automated validation works.

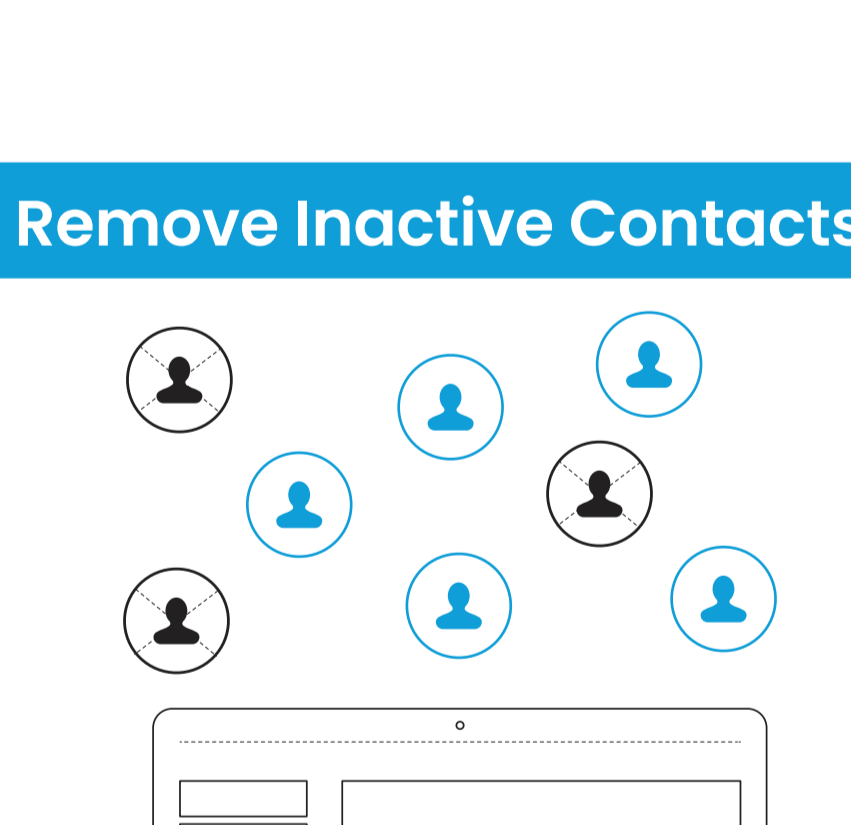
Update Customer Profiles 6

Enrich Data: If necessary, enhance your customer profiles with additional data points such as job titles, company size, or industry, using third-party data providers.

Customer Outreach: Periodically contact customers to confirm or update their contact information and preferences. Use this outreach to ask if your customer is facing new challenges or problems you can help address.



Remove Inactive Contacts 7



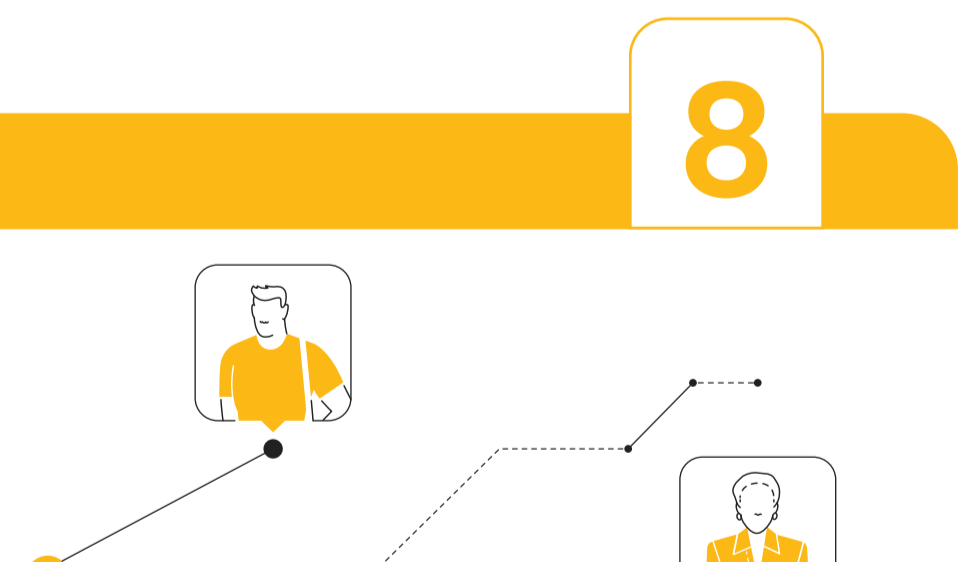
Define Inactivity: Set criteria for what constitutes an inactive contact and enact the rules moving forward. Criteria you could implement may include if a customer hasn't engaged with your brand in 12 months.

Run Re-Engagement Campaigns: Before removing inactive contacts, it's always a good idea to run a re-engagement campaign. This allows customers to update their information or confirm their interest.

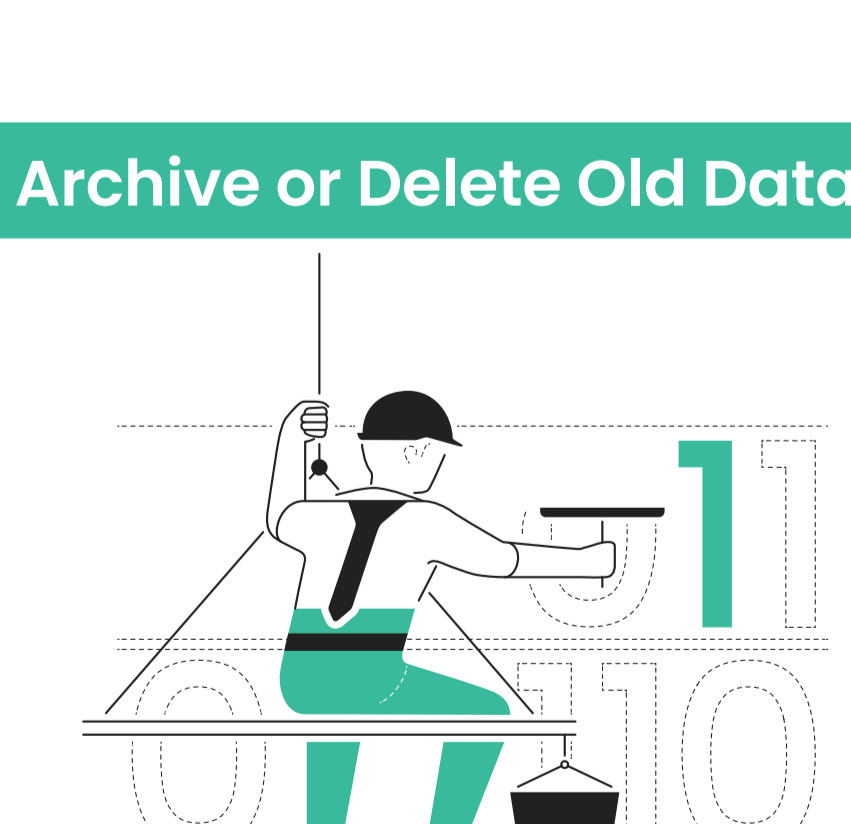
Segment and Prioritize Data 8

Create Segments: Organize your data into meaningful segments based on criteria like customer behavior, purchase history, or demographics.

Prioritize Key Segments: Focus your cleaning efforts on high-value or frequently used segments to maximize impact.



Archive or Delete Old Data 9



Create a Retention Policy: Establish a data retention policy that defines how long you keep outdated data.

Secure Archiving: Securely archive old data if it must be retained for legal or historical reasons or delete it if it's no longer needed.

Document and Monitor Data Cleaning Processes 10

Create Documentation: Keep a detailed record of your data cleaning processes and any changes made to the database.

Monitor Performance: Regularly review the effectiveness of your data cleaning efforts and adjust as needed.



Need help making clean data a reality at your business? We're here to help!

We offer a comprehensive portfolio of data solutions, including enrichment, enhancement, and licensing. Our expert team will help you maintain the accuracy and relevance of your data, giving you the competitive edge you need to grow your business.

