BizzyWeb

CRM Data Clean-up Checklist

☐ **Analyze data**

- Make sure data is up-to-date and relevant
- Identify what data is worth keeping and what can be removed
- Remove hard bounced or unsubscribed contacts

☐ **Fix formatting Issues and standardize formats**

- Fix name captializations
- Clear up phone number formatting
- Ensure email addresses are properly formatted
- Make sure there are no spelling errors, wording issues, or spacing problems

☐ **Consolidate and standardize data fields**

- Standardize data fields upfront
- Limit the use of free form text
- Re-engage users to get updated information
- Update fields as your data base grows

☐ **Merge duplicate records**

- Eliminate duplicate data fields
- Delete bad leads through 3 criteria: Contact's last visit, last opened email, whether they are subscribed to the blog
- To easily figure out duplicates, send everyone in the database an email, see what bounces, and remove them accordingly

☐ **Organize your contact records**

- Link each contact to their company and create a new contact for everyone spoken to for a complete record of all interactions with that company
- Work out which contacts are still active in the database
- Create list for contacts that bounce, and eliminate contacts that aren't relevant

Organize lead sources

- Create a form or lead flow
- Divide your contacts into smaller groups based on similarities, which will help with your content
- Create either a smart list or a static list to organize your leads

Perform a data audit

- Run a data audit to identify the information currently in your database and where it's stored
- Determine those who are most likely to use or purchase your product based on their sector or job title, from here prioritze your data based on their value

Fill in any gaps

- Identify what your data fields should be an if they are relevant and valuable
- Think about the data you actually need for each person or company in your database
- Think about what your marketing team needs to generate personalized marketing, and what your sales team needs to stay in contact

Formulate and stick to a standard process

- Analyze your data on an on-going basis
- Have your sales and marketing teams cycle through contacts and send emails to ensure they aren't bouncing and deleting unecessary contacts
- Sticking to this process will help you determine what contacts are worth keeping and will keep your database organized