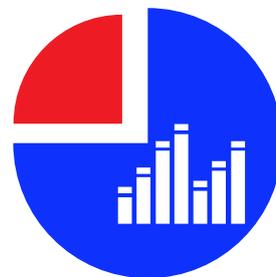


Data hygiene action plan



Make sure your data is up to scratch with this seven-step action plan:

WHY IS DATA HYGIENE IMPORTANT?

Data is the foundation on which your CRM, and by extension, your business, is built. If your data is outdated, duplicated, incomplete or inaccurate, it is not going to help drive the result you need.

Good data hygiene is essential to maintaining a database that is productive and fruitful. You wouldn't live in a crumbly old shack, so why work with a dirty database?

THE BIG 3

Users who come into contact with your CRM data should keep three things in mind at all times:

- Is this information useful?
- If not, can I do something to make it useful?
- If I can't, why is it still in the system?

IMPROVE IT OR REMOVE IT

- 1 Designate your Data Sheriffs**
 Nominate some key users who will help lead the charge against bad data and can act as a point of contact if their peers spot anything that isn't up to scratch.
- 2 Identify problem areas**
 Where does your bad data turn up? Are there specific fields in your records that are frequently populated with inaccurate or incomplete information? Find the areas that consistently cause issues and address them. Could the field be labelled more clearly, or is there another reason that users are having difficulty filling it correctly?
- 3 Create conventions for data capture**
 Draw up some guidelines for inputting new data, and work out which fields are most important to your productivity; maybe you can do without a post code, but an email address is vital. Use these guidelines to establish a minimum standard for new records.
- 4 Utilise data verification tools**
 Inaccurate data serves no purpose. Take the time to make sure any new data inputted to your CRM is valid and useful. Data verification tools, along with some good old-fashioned research, can help verify the information in your records.
- 5 Eradicate duplicates**
 Duplication is one of the most problematic examples of poor data hygiene, and can wreak havoc on your productivity, reporting, and customer satisfaction. Performing a thorough, multi-field search for existing records before entering new data can help combat duplications. If dupes continue to be an issue, consider tackling them at the point of entry. You may need to restrict data imports, or implement an automated verification function.
- 6 Address any bounce-backs or unsubscribes immediately**
 This will not only sure your data is accurate, and any dead records are amended or removed, but also improve customer experience.
- 7 Set aside time for housekeeping**
 Keeping your data in good shape is an ongoing task, but many businesses put it off until substandard data begins to cause serious problems. Setting aside some time on a regular basis to audit and scrub rogue data can help prevent any issues from escalating, and reduce the need for a full-scale cleanup operation further down the line.

Source: Nigel Frank International

