

# THE DOS' AND DON'TS OF CRM DATA CLEANSING

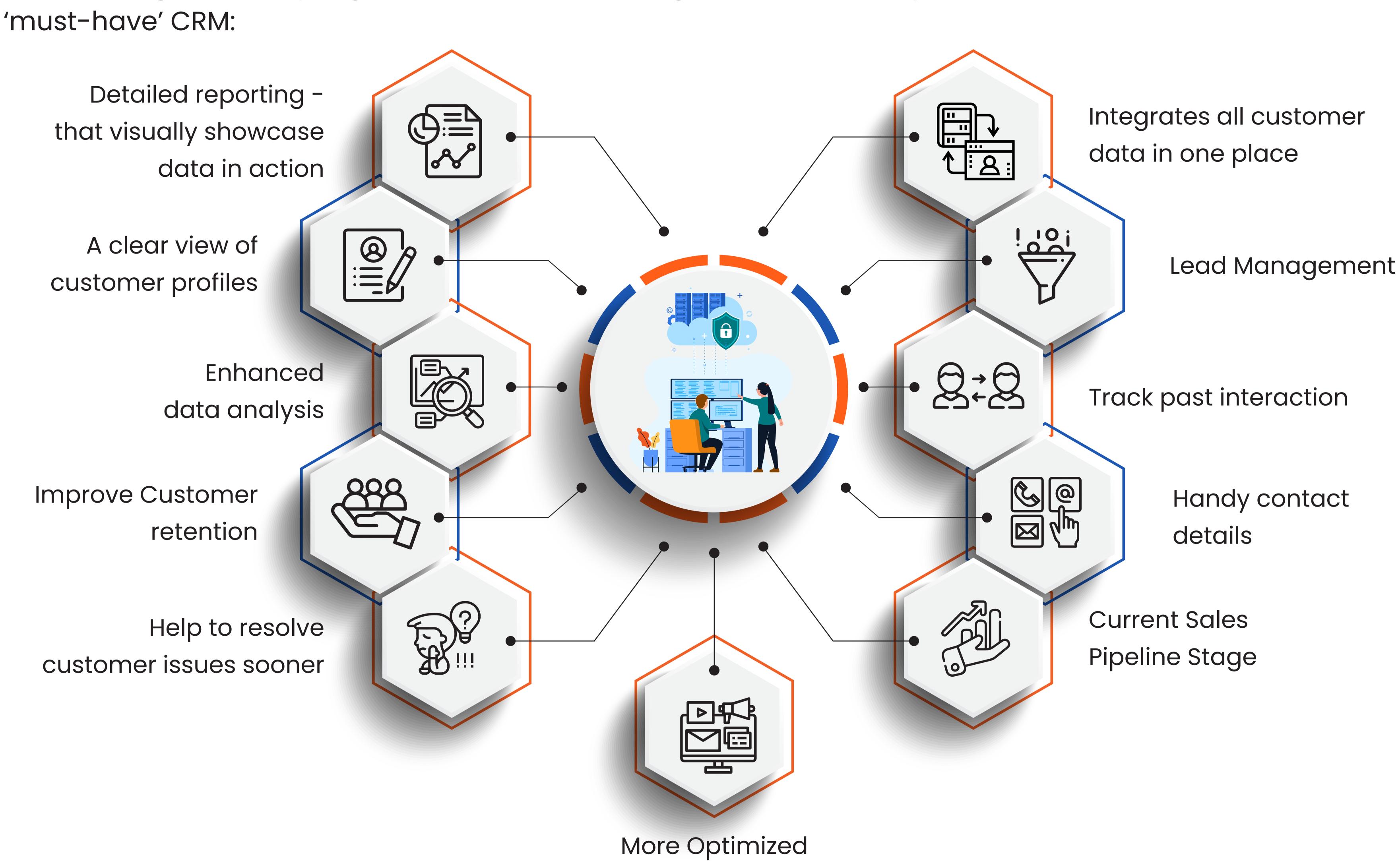


### WHAT IS CRM?

CRM is an amalgamation of strategies, practices, and technologies, which companies use to maintain and analyze customer data and intercommunications throughout the customer lifecycle. The CRM systems assemble customer data sourced from various channels, such as events, marketing campaigns, cold-calling, conference, etc. It also holds the communication history, clients contact points which include live chat, telephone, company website, direct mail, social networks, marketing collaterals, etc. The existing and potential customers' data compiled in a CRM system helps to attend their requirements, nurture their relationships or connections, and serve better.

### WHY CRM IS A 'MUST-HAVE' FOR ORGANIZATIONS?

In a nutshell, CRM platforms work as a data house for combining entire customer lifecycle data for streamlining and analyzing valuable audience insights. To be more specific, here are a few reasons to



Marketing Strategies







### Complete Data is the Real Data

Ensure all fields of a record are updated to ensure completeness of data.



ECRM

### Don't Treat CRM as a Data warehouse

Unlike data warehouses, CRM is designed to give a full-fledged view of customer profiles. Hence, it should not be used just to pile up the data.



#### Standardization There has to be a set of rules and guidelines to

maintain the data cleanliness in CRM. Businesses should make sure everyone is responsible for maintaining the data hygiene in their CRM system.



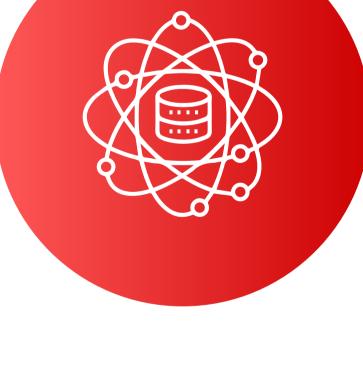
### Don't Make Every Field Mandatory

Remove the redundant fields if you are merging various datasets in your CRM. As multiple fields with the same purpose might make your database bloat.



## Hunt Down or Merge the Doppelgangers

Duplicate data is the most significant and common issue with CRM databases. Multiple records for the same contact/ account make the entire database complicated than it needs to be. It takes up additional space of CRM and makes the process of moving through records more time-consuming and thereby delaying the task.



#### Don't Keep Old Inactive, Unengaged Accounts

Eliminate the static customer data, as less mess makes the cleaning process and CRM data management easy.



### Set up a Maintenance Schedule

Don't wait for a month, quarter or year to end to initiate data cleansing because bad data won't wait for the same to enter in your CRM. Regularly clean the data!



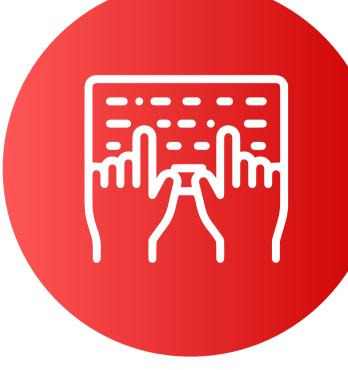
#### Don't Dump Data Collected from **Networking Events**

Data gathered from networking events might double the chances of data duplication in your CRM and disturb the whole database system.



Consolidate Unnecessary Fields First and foremost, define what data is important for your business and accordingly set the data fields and think what additional key insights you

would need to understand customer's needs.



### Don't Overlook the Typos

Spellings errors or typos can stay in the data system for years and cause a business loss because of the incorrect name of the customer, wrong mail address, etc., if not corrected right away.



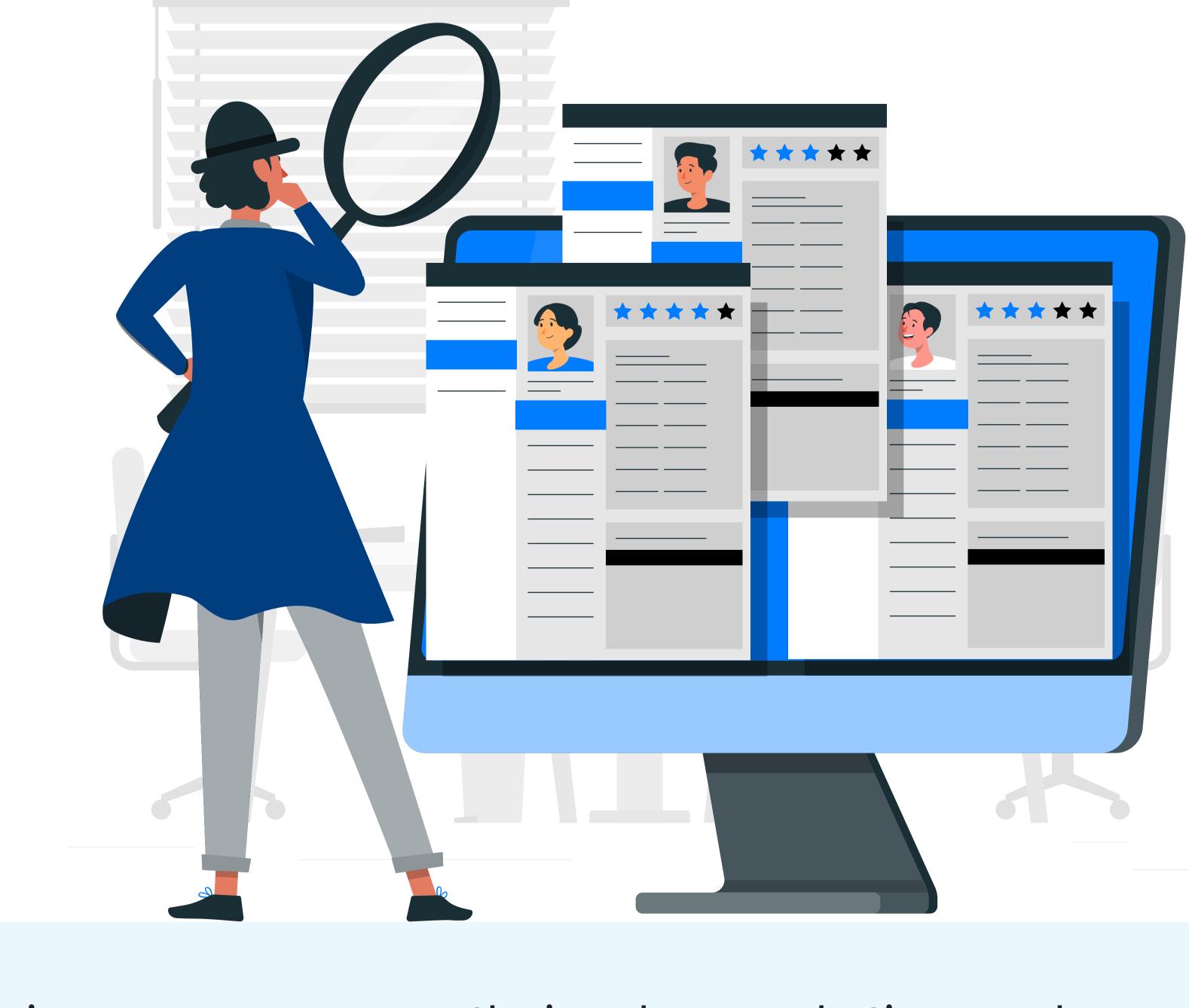
### **Train Your Team**

Communicate the value of accurate record-keeping to others and train them well to follow the processes.



### Outsource Data Cleansing Responsibility

Keeping the database updated at all times is of paramount importance, and CRM maintenance is a full-time activity. So it's best to outsource this task to database cleansing experts and let your team focus on their core activities.



By practicing the above CRM data management practices, businesses can ensure their sales, marketing, and management team can be armed with all the crucial information they would need to churn the entire sales process that too in a streamlined manner. To know more about how to keep CRM data clean, connect with our Data quality management team right away!

Datamatics Business Solutions Ltd. (DBSL) is a pioneer in providing intelligent Business Process Management (iBPM) services.