CRM Cleanup Guide

Deep clean your customer database to optimize your marketing and sales

thryv

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Without a doubt, your Customer Relationship Management (CRM) software is a fantastic tool. It holds information about the entire lifecycle of your current and potential customers, allowing you to track interactions and grow customer relationships. But this tool is only as good as the data you feed it. In this guide you'll learn how to clean out bad data and keep it tidy for all of your teams.

> **91%** *of businesses with 10 or more employees use a CRM tool.*
> *~Grand View Research*

01 Locate Big Bad Data: It's Every Company's Enemy

Incorrect, outdated, duplicated, misformatted or incomplete data will, without fail, hinder your marketing and sales teams' attempts from being as successful as they could be.

If you're collecting customer data from your website, pop-up events, sales team interactions or mailing lists, make sure the information is correct. Poor data is a time and **money killer**.

Tidying up your company's customer relationship management (CRM) system is no quick task. But it's worth doing. Without it, sales and marketing departments **lose an estimated 50 hours and up to $32,000 per sales rep**, according to LeadJen.

> *An average of 40% of leads are invalid, incomplete or duplicates.*
> *~DemandGen Report*

95% *of businesses surveyed said data quality issues seriously impair their ability to fully leverage their CRM. ~CXMToday.com*

Bad Data Types

1. Incorrect Information

Storing incorrect information like wrong names, addresses, emails and phone numbers means your marketing team is reaching either no one or worse — the wrong person.

Incorrect data is a no-go. Sending prospective or current customers messages with the wrong information harms your brand, especially when using marketing automation tools.

Nothing says "I don't care" more than regular emails addressing customers by the wrong name.

2. Outdated Information

It's safe to say you've been collecting potential and current customer information for as long as you've been in business.

That means the information you're using could be years out of date. Especially if you work with other businesses.

> **44%** *of businesses surveyed said they* ***lose over 10% in annual revenue*** *due to poor quality CRM data. ~CXMToday.com*

If your company works with a representative of another company, you'll want to make sure that contact is still with the company or in the same position.

3. Duplicated Information

Duplicated information is the most common form of bad data. Partial and exact duplicates occur from:

- CSV import and export errors
- Manual entry errors

If you have multiple contacts with the same name, address or phone number, you're not only taking up extra space for no reason, but you're also going to think you have more customers than you actually do.

You're also likely sending redundant communications. Yikes.

4. Misformatted Information

Formatting errors like missed capitalizations, phone numbers without spaces and various abbreviations are more than irritating — they're usually the cause of duplicated data.

When formatting requirements aren't in place, manually entered data from sales reps and customers will be inconsistent.

Formatting Types to Consider:

- Phone Numbers: 3217654321, 321-765-4321, (321) 765-4321, 1-321-765-4321
- Dates: 03/07/2021, 3/7/21, 7/3/2021, March 7th, 2021
- Capitalization of Names and Companies: Becky Young, becky young, Becky from Young Plumbing

02 Stop the Chaos: Merge as One

The first step to tidying up your CRM is identifying those pesky duplicate files. But before you go on a delete spree, let's merge.

Because merging cannot be undone, double-check you have the correct data you'd like to combine. Correct any inconsistent data and formatting issues.

Duplicates occur when:

- Team members unknowingly enter the same data
- The CRM doesn't recognize existing cases with the same information
- Customers submit data more than once

Take the initiative to verify contact information before clicking save. Otherwise, you run the risk of handing your staff useless information.

For unavoidable manual entry points, alert your staff to which format is standard for your company and put validation requirements in place to avoid misformatted information.

Take note of where your duplication issues are.
If you notice formatting issues, limit manual entry by using dropdown and button options when possible.

> *Sales employees without access to a CRM spend about an hour a day manually entering data.*
> *~Small Biz Genius*

03 Deep Clean: Delete Useless Data

Quality data is a top priority. You cannot address and correct issues you can't see, so clearing out unnecessary items is a must.

First, define which contacts are worth keeping. Then purge those not making the cut.

- Set a contact age standard. Delete older ones or those requiring verification on whether they're up to date.
- Determine how long contacts remain inactive before being deleted.
- Decide how often to check your unsubscribe list to purge those contacts.
- Agree to scrap contacts using "Info@" email addresses for personal company emails.

The criteria should be created with your business, target market and customer personas in mind. Write them down before beginning the process. Then get sales and marketing team buy-in.

Keep or Delete These Contacts?

Keep

- ✓ Active leads
- ✓ Opportunities in progress
- ✓ Active customers
- ✓ Activity within 12 months

Delete

- ✗ No or bad email address
- ✗ No or bad phone number
- ✗ No activity in the past 12 months
- ✗ Unsubscribed

You're not deleting to make space for new data. **You're maximizing data accuracy.**

04 Keep the Clean Streak Going: Here Comes the Maintenance

No matter how often you do it, your company needs a system to keep your database clean.

Once you've set those guidelines for your sales and marketing teams, make following through a habit. CRM cleanup is no set-it-and-forget-it job. When you're done correcting, build clean habits.

Helpful Tip:

Know what's most important for your business. If any data is not relevant, remove it from your CRM.

> *Poor data quality costs the U.S. economy an estimated $12.9 million yearly. ~Gartner*

Schedule Regular Cleanings

Staying on top of CRM cleanings is a must to prevent errors and collecting useless data. It might seem excessive, but quarterly cleanups are a great starting point for businesses deciding how often to scrub their system.

If every quarter you notice about 20% of contacts are missing vital data, contain duplicates or are customers who have unsubscribed, consider switching to monthly cleanings.

If you're seeing much less than that, then it's safe to say your cleaning schedule works for your company.

What to Look for During CRM Cleanups

- Missing data
- Duplicate data
- Conflicting data
- Inactive accounts
- Old/aging data
- System updates

Helpful Tip:

When building out your CRM maintenance strategy, consider assigning certain files to specific employees.

That helps your team tackle cleanings in bite-sized chunks while causing little stress.

Limit Admin Access

If your employees frequently make multiple profiles for the same client, try limiting the number of staff members with those account permissions.

For example, every person on a salon's staff doesn't need access to creating new files for clients.

Those permissions should be limited to front desk personnel. That avoids well-meaning groomers from stepping in and accidentally causing any mistakes.

Consider hiring a person or two for data entry. Or bring in temporary gig help. Or take it on yourself if you have the time and organization skills.

Stop Duplicates at the Source

Extend the time you go between CRM cleanups by using any system features designed to prevent duplicate contacts before they're submitted.

A single pop-up alert notifying your staff that similar information already exists can save your staff time. And if you're charged by the seat, if could save you money.

> *A tidy CRM will help you create more relevant and personalized connections with customers. And 56% of consumers say they expect offers to always be personalized.*
> *~Insider Intelligence*

05 How to Make Merging Simple

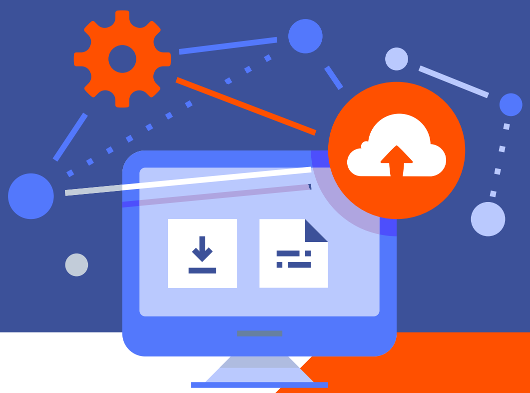
Clients contact your company in multiple ways and Thryv captures it all. Duplicate client records can happen, but Thryv has you covered. We make keeping your client list clean and up to date a breeze.

Merging client information — such as messages, their sources, client details, tags, client notes and staff assignments — into a single client record is easy. Once you identify a duplicate client record, you can merge it to your main client record.

All messages and their sources, any client details, tags, notes and staff assignments will be transferred during the merge.

Helpful Tip:

The best CRM solutions will fully integrate with any other system in your business, such as marketing or payments.



Choose a CRM Your Entire Team will Love

The customer relationship management tool you choose will only be effective if your team embraces it and keeps it updated. The best CRMs will act as the heart of your business, and all other actions, such as payments, marketing, communication, appointment scheduling and more, are connected to your CRM data. Learn how Thryv puts your customers at the center of all you do.

Learn more

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