Guide

RingLead

The Complete **Data Quality Guide**

For CRM and Marketing Automation Users

Introduction

Dirty data has a way of silently infiltrating your organization, causing frustration, inefficiency, and poor user adoption. Poor data quality can affect each department in very different ways. But unless there is a "State of Our Data" address, the problem can not and will not be brought to the forefront of the organization's priority list.

So what exactly is bad customer data? It can be defined as a record that has any or all of these traits: incorrect information, inconsistent data types, missing information, and duplicate (redundant) data.

Dirty data's negative effects are much more impactful than most realize. Reports, analytics, insights, automated processes, workflows, and nurture campaigns are all irreparably harmed or skewed by poor data quality. Organizations invest tremendous time, money, and resources into CRM implementation, administration, and improvement, but it's all rendered useless when a system comes into contact with dirty data.

Many platforms charge based on storage size and record counts; so you're paying for the same data multiple times. Bad data also hurts your ability to generate revenue through data-driven processes. According to a study by SiriusDecisions, a strong organization will realize nearly 70 percent more revenue than an average organization purely based on data quality.

Nearly all CRM challenges come back to poor quality data. But unfortunately, there is not one single remedy for dirty data. It takes meticulous time, thought, and planning to create a strategy to clean up the dirty data in a system and keep it running optimally going forward. There are solutions to find, remove, and prevent bad data as well as enhance the data you already own.

This guide aims to help you learn how to prevent dirty data and maintain only high-quality data in your CRM or marketing automation system. This can be broken up into three main topics: analysis, cleansing, and enhancing. Within each area, this guide aims to provide a brief overview and definition, best practices, and a detailed look at the products that can help you achieve your data quality goals.

Analyzing Your Data

Before you can start cleaning your data, you need to know the overall state of your database. Profiling your data allows you to gain a sense of what data you have, what the information looks like, and what potential issues may exist regarding the quality of the data. This initial step in your data quality campaign is essential, as it allows you to uncover issues and prioritize the information that might require manual intervention from you or your staff. Simply put, you're looking to find out how dirty your database truly is?

Examine the state of your database by asking the following questions:

- How bad is our duplicate situation?
- Where are the duplicates coming from?
- What % of my records are missing key fields?
- How many different versions of this record exist?
- When was the last time we deleted stale data?
- How often do incomplete or inaccurate customer records negatively affect daily processes?

Ultimately, it all boils down to a single overarching question: *is my data getting the job done?*

For most organizations, the answer to this question is a resounding **no!** But where successful organizations differentiate themselves from the complacent is whether or not they choose to do anything about the dirty data problem; or of they choose to let it continue to harm their sales-marketing strategies.

How to Analyze your Dirty Data Problem

For Marketo users, I would suggest using the "Possible Duplicates" system smart list to identify exact email duplicates in your Marketo Instance. Of course, this will not paint a complete picture of the dirty data inside your marketing automation database, but it's a good start.

Unfortunately, there is no native way to find the total number of duplicates in a Salesforce Org. There are apps on the Salesforce AppExchange that can help analyze total duplicates like Dupe Dive. Use this free tool to uncover the total number of duplicates in your CRM.

Of course, duplicates are only one component of dirty data, but they are often the costliest to productivity and ROI on software purchases. Finding and merging duplicates is a precursor to a total database overhaul, as all other data cleansing processes are improved after duplicate matching.

Cleaning Your Data

In this section, we'll cover data standardization, duplicate data, and appending incomplete data.

Data Standardization

Establishing data standards throughout your personnel and systems is a key part of maintaining data quality. A lack of standard data formatting and procedures is among the biggest causes of poor data quality. Non-standard (inconsistent) data has numerous negative effects on segmentation, targeting, and personalization. Unfortunately, data standardization is often left out of discussions when establishing a data governance strategy. But this often-overlooked facet of data quality is too important to be left out of this guide.

A lot of bad data comes down to human error. If an organization doesn't have any sort of standards or policies to articulate the ideal ways by which the data should be entered into their CRM, different iterations of the same data will quickly form. Non-standard is a special kind of dirty data because it is not only a symptom but a cause of other types of dirty data including incomplete or missing data, outdated information, and duplicates.

Here's an example of non-standard data: the many ways to write "Director of Human Resources"

- Director of Human Resources
- Director HR
- Director, Human Resources
- Human Resources Director
- Director of HR
- HR Director
- DIRECTOR OF HUMAN RESOURCES

These 7 terms all refer to the same job title. However, to case & form-sensitive reporting systems such as a CRM or a marketing automation platform, these are all different values.

Because the data comes in through many different outlets --- web forms, manual entry, list uploads, etc.--- there is little uniformity. Now imagine trying to segment and target the HR director persona and attempting to take into account all variations listed above.

How to Standardize Your Data

First, establish how you would like your titles and fields to look, then communicate this information throughout your organization to maintain data standards going forward. Once completed, you will need a way to handle existing inconsistent data. Data standardization services transform data into a uniform format, enabling you to identify outliers and remedy errors.

Seeking an external tool to standardize your existing data is the best way to combat the non-standard data that has already been entered. This process is sometimes called normalization. Setting standards and automating the standardization process can help create a neat, organized CRM that will in turn help increase data accessibility and navigability.

Common Standardization Use Cases Include:

- Proper case formatting (e.g. "john" and "JOHN" become "John")
- Standardized job titles (e.g. "Dir. of Marketing", "Marketing Director" and "Dir. of Mktg" become a value that you define)
- Standardized state and country values (e.g. "New York", "NY" and "ny" become a value that you define.)
- Standardized address values (e.g. "Street", "St." and "st" become a value that you define)

Cleaning up Duplicate Data

Identifying and merging duplicate data is not only crucial in any data cleansing campaign, but it can uncover problems you didn't even know you had inside your CRM or MAP.

In the battle of system administrator vs. duplicate data, all too often the duplicate problem is too pervasive for manpower alone. Seeking an automated solution, much like the aforementioned data normalization services, is the best practice for tackling the duplicate data dilemma. The solution is to clean your existing database and then stop duplicate data before it enters your system ever again.

In the battle of user vs dupes, here's how you can win.

For many, focusing on Leads might be more important than other objects in Salesforce. Real-time duplicate protection is important to ensure duplicates are stopped and prevented going forward. Depending on the data deduplication vendor, you can have many different templates to notify the owner of the lead or contact that there's a duplicate.

Typically, the account owner is alerted first. But for new leads, you can route it through your assignment rules in Salesforce. Consider using your active assignment rule or even a hidden inactive assignment rule just for your data deduplication vendor. You can also change the owner of a lead, and reroute it through the assignment rules.

Remove the duplicates by finding and merging them together based on your business-specific matching criteria (i.e email, website, firstname-lastname, etc.). A duplicate removal application merges the duplicates and cleans up the database quickly. So why not just delete duplicates instead of merging? Every piece of data holds value, so merging is the way to go.

To make sure the duplicate is merged with the right contact, you'll need to set master rule settings. This way, all new data matching the original record, or master record, will automatically match and merge. Say you have five records in Salesforce, you likely only want to keep the lead source from the first/master record, but use all of the current title and phone number fields from the most recent entries.

Once your data is clean, you want to keep it that way. Duplicate prevention stops the duplicates from forming in the future and ensures you're not simply putting a bandage on the dirty data problem. Dirty data will continue to infiltrate your system as your contact data changes, but with a robust automated duplicate prevention service, your data will be checked before it enters your system to avoid duplicates.

Whether you're manually loading the data or it comes from a web form, duplicate prevention acts as a gatekeeper to make sure all data going in is unique, clean, and actionable.

Enhancing Your Data

CRMs use a broad array of data markers to properly segment, score, and route leads -- using these markers as a veritable road map for all of your automated and manual data processes.

For example, if 100% of the emails for a particular company have the email format of Firstname.Lastname@domain.com, then you can reasonably fill in missing emails for other contacts with confidence. If you have the email domains for contacts, but the account record is lacking a website, that can be filled in too.

Leveraging data markers within a CRM allows a properly trained consultant to pre-fill data for a more complete picture before deduplication and other prerequisite data processes. In addition, the data should be standardized before the dedupe process is done.

Do you have a URL (website) field for each company in your CRM? The URL of a company is more important than a DUNS number, location or anything else. It is the single best piece of company-centric information that can be used to update your CRM over time. Alternatively, data enrichment is a viable option for organizations seeking external solutions for missing information on customer records. Appending your data can include building highly-targeted lists with freshly harvested contact information.

Contact data enrichment appends records with personal demographic information such as job title, social media handles, location, and more. Contact enrichment can be leveraged for personalized targeting in account-based marketing and sales nurturing.

Company data enrichment fills in firmographic information to get a deeper insight into a business' needs and sales-readiness. Information like revenue, employee count, and location will help determine the best approach for ABM success and improve lead assignment.

Without enhancing your existing data, you limit your database potential. Additional information on the record will help to complete the contact's information, giving you a 360-degree view of the contact. It ensures the data is accurate by verifying the email addresses and saving your salespeople time from sending bad emails. When sales teams, customer success teams, and other employees do not have access to a complete record, they waste time looking in external and internal systems in search of that contact information.

In Conclusion

Data quality is going to put you on the right track to generate revenue. Here's why:

You'll work smarter: by having the right contact's name, email address, title, etc., reps can focus on their job over manual research and data clean up.

You'll gain competitive intelligence: quality data gives you access to information that goes beyond your customers. You'll know more about your customers' market -- including prospect data, location data, future opportunities, and competitive intelligence.

You'll know more about your customers: high-quality data ensures detailed, accurate analytics to understand all aspects of your business. This information includes customer spend, buyer personas, industry types, and more. This will help you determine the most profitable segments for better product development, stronger customer service, and new business opportunities.

You'll understand company and employee performance: by understanding the number of leads they contact, how many deals they close, etc., you'll be able to gauge their overall performance and hone in on the areas in need of improvement.

You'll boost lead generation: for lead generation, the more fields you require, the less likely a prospect is to fill out the form. And with the few fields you're able to acquire, you need to make sure they're accurate. This plays into your lead routing rules. You want to ensure leads go to the right people within your organization. In doing this, the lead process will be streamlined and leads will close faster.

If you remember the key steps to data quality, including **analyzing, cleaning, and enhancing** company and contact records, you'll be on your way to a stronger, faster and more robust database than you ever thought possible.