

# AUDITING YOUR DATABASE - 41 POINT CHECKLIST

*Over time, our databases become polluted—information becomes outdated, duplicates accumulate and incomplete or junk records inevitably creep in. As a result, your database becomes a potential liability for campaign errors, GDPR/global compliance, not to mention performance metrics and deliverability rates can suffer. Use this checklist as guidance for auditing your Marketo instance.*

## ADMINISTRATION

- Users and roles
  - Alert emails
  - Backup
- 

## DATABASE / CRM SYNC

- Data dictionary
- Data normalization
- Sync architecture
- Performance
- Notifications and errors
- Duplicates

## DATA ANALYSIS

- Target accounts
  - Personas
  - Lead to account matches
  - Critical field data completeness and accuracy
  - E-mailable / engaged persons
- 

## DATA MAINTENANCE

- Enhancement
- Duplicates
- Auto-replies
- Deletion

## DATA CAPTURE

- Forms
  - List import
  - Manual entry
  - Sales emails
  - APIs
- 

## SOURCE ATTRIBUTION

- Munchkin
  - Query parameters
  - Cookies
  - Programs / channels / status
- 

## LEAD SCORING

- Firmographic and behavioral indicators
- 2-dimensional ranking
- Predictive

## EMAIL COMMUNICATIONS

- Strategy
  - Segmentation
  - Deliverability
  - Regulatory compliance
- 

## REVENUE CYCLE MODEL

- Stages
  - Transitions
  - Smart campaigns
  - Reporting
- 

## SALES INFORMATION

- Sales insight
- Interesting moments
- Sales alerts



ringlead.com



perkuto.com