15 CRM Best Practices
to Ensure Quality Data

RINGLEAD

Contents

Introduction

Nearly every CRM company and internal corporate IT department has taken a stab at solving the problem of keeping your data clean and quality. You may have heard of it referred to as CRM deduping, CRM dedupe, CRM deduplication as well as data normalization.

Unfortunately, no one has done it right. Not Oracle, not salesforce.com, not Microsoft and not SAP. Why?

Think about it: Who decides the standard? Do you want saleforce.com or Microsoft dictating the format for data storage that you use? Of course not, because every business model has unique needs. While one business may prefer storing "The Container Company" another may prefer "Container Company, The." It would be suicide for a vendor to enforce a single set of rules on all their clients. So the problem is not necessarily ignored, but it is accepted as status quo.

The answer is to never allow duplicates into your CRM system in the first place. The first step to clean, quality data is to develop a CRM Data Plan. After that, here are 14 more best practices to ensure quality, clean data for the life of your CRM and your organization.

1. Create a CRM Data Plan

Since there is no single rule for a company name, and every company is unique, a CRM Data Plan comes into play to set the standard rules. It's where you start the entire process.

Even within a single data point like a company name, there can be many rules regarding how to format that data. A CRM Data Plan covers a set of rules as it relates to contact information in a CRM. Rules exist for company names, URLs, names, titles, and much more.

A CRM Data Plan is critical to successfully tackling CRM deduplication. To comply with best practices, your CRM Data Plan should be centrally stored, and accessible by anyone who enters data into your CRM. In essence, the Data Plan acts as a single-point-of-truth for your company and how it treats data.

2. Standardize Titles

As mentioned in #1, a Data Plan is simply a set of standards for CRM data. For example, review the following ways to write:

- **Director of Human Resources**
- **Director, Human Resources**
- **Director of HR**
- **Human Resources Director (and 5 other variants)**

Lack of standards is a problem. The solution is a [technology](#) that enforces data standards. Once a standard is built, then all data passing through the CRM is standardized. Some organizations attempt to enforce data standards through training alone, but that won't work. The only way to secure your data standards is by enforcing them via technology.

3. Enforce Your Plan

If your CRM provider does not have the functionality to enforce your plan and block the entry of bad data, it means you must either build or find an [add-on](#) to your CRM.

4. Train Your Technical Staff

What about my general staff? If you enforce data standards via technology, data standards will be secured without training. However, your technical staff can sidestep regular procedures. They can import data, merge databases, and do all sorts of things that don't follow traditional data entry processes. Without training your technical staff, your CRM Data Plan can be undermined. This team can circumvent the constraints put on the average user, so make sure your technical staff is on board with your Data Plan.

5. Oversee Product Integration

Do other products that bring information into your CRM adhere to your Data Plan? Beware of products that dump data to an Excel or CSV file. Sometimes it is unavoidable, however, direct exporting systems that comply with your Data Plan and do deduplication in real-time are always a superior choice.

6. Oversee Vendor Integration

Do vendors that provide you with list data deliver it in compliance with your Data Plan? Some vendors may push back at first; however, the entire process will be smoother if the vendor complies to the Data Plan. Hold your ground and remember that list providers want your business. Show them the format that you want your data and don't compromise.

7. Oversee IT Development

Ensure your IT staff buys in to your Data Plan. The best way to make this happen is to include the IT department in the development of the plan. Is your IT staff prevented from circumventing a Data Plan by rights management? Everyone must obey the Data Plan. So, if your IT staff can circumvent best practices established by management, problems will arise. If the IT staff disagrees with a Data Plan, best practice dictates that the Data Plan be reviewed, discussed and potentially revised. Again, this maintains the single point of truth and enforceability to make your Data Plan work.

8. Pay Attention to Your URL(s)

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. The URL can be used to update and add contacts to your CRM.

9. Leverage Data Markers

CRMs include a vast number of Data Markers. These markers are a literal road map to filling in missing data. For example, if 100% of the emails for a particular company have the email format of Firstname.Lastname@domain.com, then you can probably 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. Done properly, leveraging data markers within a CRM allows the properly trained consultant to pre-fill data for a more complete picture before deduping. In addition, the data should be standardized (sometimes called "normalized") before the dedupe process is done.

10. Automate One Process at a Time

There are exceptions and sometimes you can't avoid doing a few things at once. Just be careful when automating as it can result in some duplication and bad data. If you decide to automate, define success so that you can recognize when it happens. When successful, automate something else and measure again.

11. Be Ready for Constant Redesign

It's not possible to design a complex CRM system that stays 100% to the original design. Why do major software implementations fail and go over budget? Simple: The initial design did not encompass the complexities of the real world. Balance design with diving in and checking your data premises. Be agile, be creative and get user feedback at critical milestones.

Over time, every CRM implementation adds fields, but are they being used? A great application that simply measures the utilization of fields within your Salesforce CRM is Fieldtrip. It will give you a report of which fields are actually being used and how often. Fieldtrip can help you assess and redesign, based on real-world usage.

12. Never Delete Data

When fields are incomplete or become outdated, quite often, the record gets deleted. This happens in CRMs, databases, Excel spreadsheets and in marketing automation systems. This is an error. Never delete records. Even if you have just one piece of information, such as an email, there are many options to find and add more detail to your record. An email address can help you uncover the web domain. The website can uncover the management team. The management team can include social profiles, phone numbers, more emails and so on.

In other words, your outdated and incomplete records contain wonderful possibilities.

13. Clean Your CRM

If you already have a CRM in place without a Data Plan, don't worry. You can still create a Data Plan and update your existing CRM data to ensure that it meets the plan. However, a one-time cleaning does not solve the long term problem. On average, every 30 minutes, 75 phone numbers change, according to D&B and The Sales and Marketing Institute. So if a one-time cleaning is all you do, then by next month, your data will be dirty again.
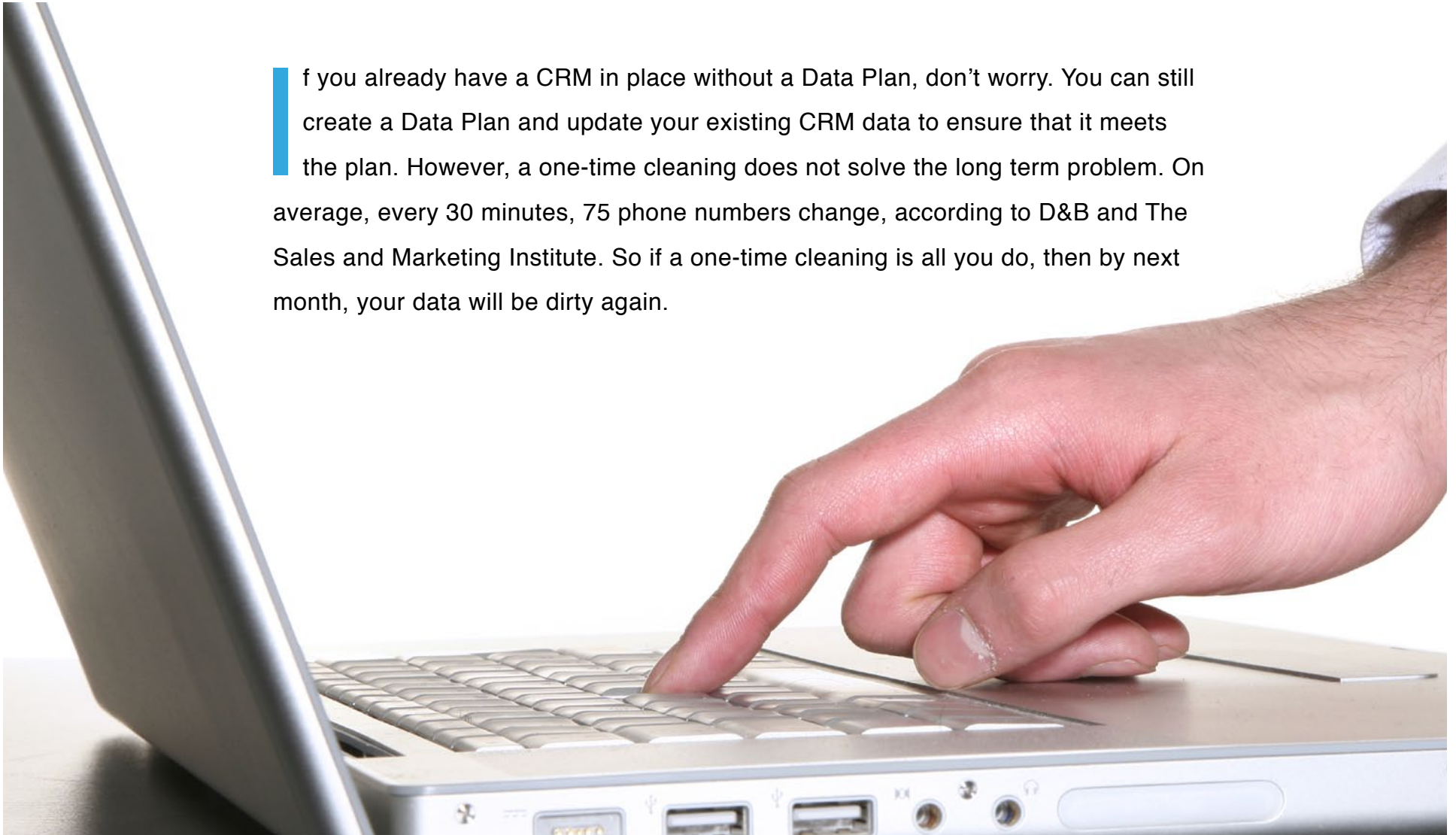
14. Ask Questions to Prospective CRM Data Vendors

There are many products out there that can solve CRM data issues. Solutions include data companies, deduplication vendors, offline data cleanse services, preventative data technology and data import technologies. Here are a set of questions to prepare yourself with.

1. How old is your data?

2. What is the source of your data?

3. How will you deliver the data?

4. Can I see the source of the data?

5. Can I see the record by record data age?

6. How do you prevent future duplicates?

7. How do you handle historic duplicates?

8. Can you consult and help me with data standards?

9. How do you enforce data standards?

10. How do you import lists AND conform them to my data standards?

11. How do you prevent human data-entry errors?

12. Can you help with change management?

13. Can you show me the bumps in the road?

14. What is the next big thing?

15. What should I be planning for?

15. The Dirty Data Quiz

The Dirty Data Quiz: Is Your CRM at Risk?

CRM Data Plan. 15 points. Does your company have a CRM Data Plan?

Your points: _____

Staff Training. 5 points. Has your staff has been trained on your Data Plan and it is easily accessible?

Your points: _____

CRM Cleaned. 5 points. Has your CRM gone through a full normalization and deduplication process?

Your points: _____

CRM Enforcement. 15 points. Is your Data Plan enforced by your CRM?

Your points: _____

Product/Integration Enforcement. 10 points. Do other products that bring information into your CRM adhere to your Data Plan?

Your points: _____

Vendor Enforcement. 10 Points. Do vendors that provide you with list data deliver it in compliance with your Data Plan?

Your points: _____

Import Enforcement, by culture. 5 points. Does the IT staff buy in to your Data Plan?

Your points: _____

Import Enforcement by Technology 15 points. Is your IT staff prevented from circumventing a Data Plan

by rights management?

Your points: _____

URL Enforcement. 20 points. Do you have a URL (website) field for each company in your CRM?

Your points: _____

How did you do?

Your score:

_____

SCORE	GRADE
<20	F
40	D
60	C
80	B
100	A

Conclusion

When you bought your CRM, it was probably empty. If you import dirty data from an old CRM, the new CRM will be dirty. Massive duplicates and miskeyed data does not become a problem until after you start to use your CRM. Once a CRM is implemented, it is typically at that point when you realize there is a huge problem with the information. Without a systematic way to start and keep information clean, duplicates will happen in your CRM. This is good for professional service firms, but bad for you and your CRM. The best solution is not treating a symptom, but curing the disease. We hope this ebook helped you find the path to pure, quality data.

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Clean, protect and enhance your data.

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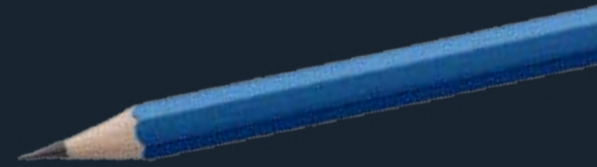
RINGLEAD

Backed by patented technology, RingLead's Data Management Solutions (DMS) is the only cloud-based, end-to-end data management solution on the planet that provides 360° care for your CRM and marketing automation system. Within DMS your team can clean, dedupe, normalize, protect, and ENRICH your data.

SNEAK PEEK OF WHAT'S INSIDE DMS:

Automate data quality within your CRM with our deduplication task scheduler found in DMS Cleanse. Use 55+ custom matching logic rules to identify and merge duplicates based on your company's unique needs.

Prevent duplicates from being created through web forms, manual entry and list uploads using DMS Duplicate Prevention.

Discover, capture and import quality leads in seconds using DMS Capture.

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DMS addresses the demand for a product that bridges the gap between sales leaders and marketing executives by providing clean, rich data, and flawless integration.

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