

7 Simple Do's To Maintaining a Clean CRM Database

By Vaibhav Domkundwar

A pet peeve for anyone in marketing or sales who works with Customer Relationship Management (CRM) software while setting up their direct mail or other outbound campaigns is bad data. While there are great features when it comes to hosted CRMs like Salesforce.com or Sugar CRM, you will only realize the full potential of these CRMs if you maintain clean data. A poorly maintained database results in lots & lots of inefficiency, whether you need to run reports for analytics or even simple tasks like printing out addresses for direct mail campaigns.

With multiple access and data pouring in from several sources, CRM database maintenance is not as simple as it may seem. It needs a disciplined 'every day' process and consistent effort from all of those who use it. Here are a few simple Do's to maintain a clean database:

- Do make sure you enter only the data you need into your CRM and filter out what looks like junk right at the start. Many have a habit of dumping entire excel or csv sheets of leads, accounts and contact data which hasn't been screened before upload for junk data which may be completely unnecessary.
- Do run your data through a normalization process and format all the data well in the csv file or sheet before you upload it to your CRM. It's a lot quicker and it can save you from having to access several accounts and check data online once it has already been assigned to various user accounts and campaigns.
- Do label all campaigns and sets of uploaded data items with a standard company-wide naming convention which is clearly understood by users and ensures that every record is assigned correctly. As simple as it may seem, a lot of accounts have data that is simply uploaded and in time nobody knows its source, to which campaign it belongs or whose lead it is.
- Do follow a standard convention across all users for entering data such as account names, postal addresses, job titles, etc. It standardizes formats and makes things easier while printing reports or direct mail campaigns.
- Do look for missing data elements like a missing phone number or missing zip code in the address, preferably before uploading the data or at least while entering an individual record. Appending missing data at an earlier stage when there are fewer records to handle is a lot easier than having to go through the entire database and then look for what's missing.

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- Do ensure that users update the status of a company, lead or opportunity every time some activity is performed. If these are not updated the reports run on this data will yield inaccurate results.
- Do run regular audits for data quality and carry out a data cleansing effort periodically (at least once every quarter). If you can do it more frequently, there will be less data which needs to be updated or cleansed and the data will stay in better shape.

Good data in. Good data out. It's that simple!

About the Author

Vaibhav Domkundwar is the founder & CEO of ReadyContacts, a unique customer development solutions firm with a focus on B2B lead data management. Vaibhav also founded BetterLabs, a unique product incubation firm based in San Jose & Pune, India. Prior to this, Vaibhav was a co-founder and Director of Marketing at Roamware, a global leader in mobile roaming services with a customer base of 292 mobile carriers in 116 countries. Earlier in his career, Vaibhav held product management roles at Corio and i2 Technologies. Vaibhav graduated with a Master of Science and a Management of Technology degree from University of California, Berkeley and holds a Bachelor of Engineering degree from College of Engineering, Pune, India.

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