CHECKLIST

FROM MEAN TO CLEAN IN 8 STEPS

Remember the movie Gremlins ? If you're under the age of 35, it's probably before your time. But it's a cautionary tale that marketers of every age should know, because the story of how those furry balls of cuteness turning to scary, fanged mischief-makers is the story of how good marketing data goes very, very bad.

While your database may seem like a tame and well-behaved beast on the surface, you need to pay attention and follow the rules to avoid losing control and ending up with a monster on your hands.

Bad data is bad for business

Unlike Gremlins, which enjoyed their heyday in the 1980s, the impact of bad data continues to grow with each passing year.

Experian's 2015 data quality benchmarking report (gated content) highlights the importance of the issue and the prevalence of bad data everywhere. According to the report, 99 percent of organizations believe data is essential for marketing success, yet few organizations feel confident about data quality. In fact, the vast majority of US respondents (92 percent) suspect their customer and prospect data might be inaccurate in some way.

And it's not just a bad email here and a misspelled name there: it's a big issue. In 2014, US organizations suspected that approximately one quarter of their data (25 percent) was inaccurate, and in the span of just one year, that number rose to nearly one third (32 percent).
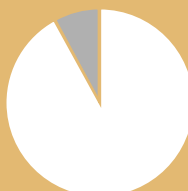
Those data issues directly impact revenues. **More than four out of five organizations believe inaccurate and incomplete customer or prospect data results in wasted resources, reduced productivity and wasted marketing and communications spend.** 🐦 **SHARE THIS!**

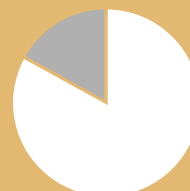⚠️ **WARNING: The impact of bad data**

99% say data is essential to marketing success

92% suspect their data is inaccurate

83% say inaccurate data impacts revenue

Clean data starts here

How can you ensure your data is supporting rather than undermining your success? The following eight-point checklist for the care and feeding of your database will help to take it from mean to clean.

Step 1: Assess the issue.

You need to know how bad it is before you can fix the problem. Check your database to see how much data is missing and how many variants there are in the system. There are some great tools to help you audit your database, including Kickbox and NetProspex Data HealthScan .

Step 2: Clean up what's there.

Always clean up the existing records in your system before putting new filters and controls in place. 🐦 **SHARE THIS!** If you're missing a lot of data, consider using a data connector that consolidates data from different sources and fills in the blank values. If the same data is getting recorded in different variations, consider normalizing the data—a process that converts multiple variations to a single, "normal" version.

Step 3: Consult before deleting.

Before deleting any bad records, check the salespeople who own them. Merging records is always preferable to deleting: remember how much hard work it took to collect that data in the first place!
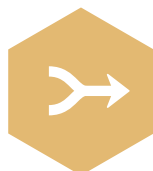
Step 4: Normalize your fields.

Now that your existing data is clean and tidy, you can put practices in place to keep new data clean. Start by replacing regular fields with normalized fields that automatically convert variations to a single version of the data. For example, whether users type "US," "U.S.A.," or "America," a normalized field converts the content into a single standard of your choice.

Step 5: Use picklists where possible.

Picklists—field forms that offer a list of predetermined values—are ideal for capturing data about people's industries, areas of interest, job titles, roles, regions and many other types of demographic or firmographic information. **By limiting the amount of free-form data entry users can input, you can limit the number of errors significantly.** 🐦 **SHARE THIS!**

Step 6: Use progressive profiling.

In a marketing automation system, progressive profiling allows you to recognize returning prospects so that you can ask them to fill out additional data only.
🐦 **SHARE THIS!** When you eliminate their need to rekey data, you can significantly reduce the number of duplicate entries, fill in any gaps, and provide a more personalized experience for your prospects, too.

Step 6: Clean up visibility settings.

Keeping the user visibility settings up to date in your CRM or marketing automation platform can go a long way towards keeping your database clean. By limiting visibility to only what the role requires, you can minimize the risk of duplicate entries. Staff roles and responsibilities can change frequently, so plan to review these settings on a regular basis.

Step 7: Support compliance efforts.

Good database hygiene is a group effort, but you need to motivate and empower people to get them on board. Make sure every user understands how bad data impacts their performance (use some of the numbers from Experian to communicate what's at stake) and has the tools they need to improve their data hygiene, including training sessions, documentation, and ongoing support.