

Podcast Script: Cleaning out your closets (of data)

Welcome to this 60 second sugar snippet. My name is Susie Williams. Today we're going to talk about cleaning out your closets, so to speak, in your Customer Relationship Management system.

When I first lived on my own, I moved around a lot. Between college dorm rooms, summer jobs back home, living with friends, and a parade of jobs and apartments, I managed to move about once or twice a year. I was very adept at only holding on to the bare minimum of stuff, and was proudly able to move all my possessions using just my little Toyota Tercel.

As I've grown older, I stopped moving so much and have actually lived in my current house for 10 years! But that accomplishment comes with a cost—I have lost my built-in purging mechanism. Stuff has slowly accumulated in my life to the point where I have too much clutter. I catch myself scanning the Real Estate section of the newspaper to see if I can find an excuse to buy another place and move, just so I'll be forced to purge my extra things. It's silly, I know. The real answer is to do what I did before without actually moving: pare down those things that aren't absolutely crucial and get rid of them.

The same can be said for you CRM administrators out there. If you've been running your CRM software for a few years, no doubt you've got old data in the system that's just getting in the way. Your users are complaining that it's tough to find any good leads because of all the extraneous junk. So maybe it's time to clean house and get rid of all that data clutter. Clean, accurate and usable data is your goal.

An excellent time to “clean house” is when you move from one CRM system to another, or when you upgrade from one major release to the next with your current CRM solution. Since major software releases tend to happen about once a year, the timing is good for a thorough cleaning of your data as you upgrade the software. The last thing you want to do is to drag around unwanted legacy data to your shiny new system. That would be like bringing along your dusty old leg warmers and parachute pants to your new master bedroom closet. Yecch!

So how do you identify what to keep and what to toss? One idea is to have the data owners take a pass through their accounts and tell you what they want to keep. It's a good chance for sales reps to review their accounts, and to either act on their opportunities or declare them “dead”. They may uncover some hidden gems too that they'd forgotten about. Another idea is to use a de-duplication, or data cleansing, tool to get rid of duplicate data. There are lots of third party software tools on the market to help with this task.

Of course, ensuring that the data you enter is clean from the get-go is another best practice to follow. If you're manually entering accounts into the system, train your sales reps to search for duplicate records first before adding new records. The software should

help you out with this task by flagging possible duplicates when you convert a lead. The old adage “garbage in, garbage out” applies to your customer data as well. Make sure names and email addresses are spelled right, and double-check the company’s address information too by verifying it against the company’s website. Categorizing your leads as “hot” “medium” or “cold” also helps keep track of which ones to keep and which ones to toss. In the end, you’ll have that clean, accurate and usable data, and your users will thank you for it.

And that's your 60 second Sugar snippet. Goodbye!