Data Cleansing Checklist

Data quality is the cornerstone of successful operations. Ensuring that your data is accurate, consistent, and up-to-date is essential for informed decision-making and efficient processes. In this checklist, we'll guide you through the steps to maintain a clean and reliable database.

☐ **DATA GOVERNANCE**

Appoint a CRM administrator responsible for data governance. Additionally, define roles within your organization for managing data. This ensures accountability and ownership of data quality.

☐ **DATA VALIDATION & PROPERTY RULES**

Incorporate measures to audit or archive inactive properties, keeping your database up-to-date. Create property validation rules for essential fields to maintain data consistency, and regularly review and update these rules to adapt to evolving data requirements.

☐ **DEDUPLICATE MANAGEMENT**

To maintain data integrity, regularly scan for duplicate contacts, companies, and deals within your CRM. Utilize HubSpot's deduplication tools to merge duplicate records, preventing data redundancy.

☐ **INTEGRATION CHECK**

Review all integrations connected to HubSpot to ensure smooth data synchronization. Resolve any data sync issues promptly to avoid discrepancies and inaccuracies in your dataset.

☐ **DATA STANDARDISATION**

Leverage Operations Hub's 'format data' workflows to automatically standardize data, including capitalization, rounding, and trimming. Consistency in naming conventions is crucial for data quality.

☐ **INACTIVE DATA CLEAN UP**

Identify and archive invalid records to declutter your database. Implement a data retention policy to manage the data lifecycle effectively, maintaining a clean and relevant dataset.

☐ **ONGOING IMPROVEMENT**

Use the Data Quality Center to monitor the health of your data continually. Adapt and enhance your data cleansing strategy based on feedback and changing business needs for continuous data quality improvement.

Maintaining pristine data is an ongoing commitment! If you would like to stay ahead and maximize your data's potential, consider investing in advanced data management tools like HubSpot

Contact us to learn more and unlock the full potential of your data today. Your journey to data excellence begins now!

Get in Touch Today