Data cleansing *checklist*

Data quality is the cornerstone of successful operations. Accurate, consistent and up-to-date data is essential for confident decisions and efficient processes. Work through these seven steps to keep your database clean and reliable.

☐ *01*

Data governance

Appoint a CRM administrator to own data governance, and define who manages which data across your organisation. Clear ownership means clear accountability for data quality.

☐ *02*

Data validation & property rules

Audit or archive inactive properties so your database stays current. Set validation rules on essential fields to keep data consistent, and review them regularly as your requirements change.

☐ *03*

Duplicate management

Scan regularly for duplicate contacts, companies and deals. Use HubSpot's duplicate management tools to merge records and stop the same data living in two places.

☐ *04*

Integration check

Review every integration connected to HubSpot to make sure data syncs smoothly. Fix sync errors quickly, before they create gaps and inaccuracies in your data.

☐ *05*

Data standardisation

Use Data Hub's (formerly Operations Hub) 'format data' workflow actions to standardise capitalisation, rounding and trimming automatically. Consistent naming conventions are key.

☐ *06*

Inactive data clean-up

Identify and archive invalid or outdated records to declutter your database. Put a data retention policy in place to manage the full data lifecycle.

☐ *07*

Ongoing improvement

Use HubSpot's Data Quality tools to monitor the health of your data continuously, and adapt your cleansing strategy as feedback and business needs change.

Clean data is an ongoing *commitment*

Staying ahead means making data quality part of how you work, backed by the right tools, like HubSpot Data Hub. Talk to us about unlocking the full potential of your data.

Get in touch →