

FREE CHECKLIST

CRM Data Hygiene Checklist

A one-hour monthly routine that keeps your CRM clean enough to trust, report on and automate.



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Why bother?

Every automation, report and AI tool you point at your CRM inherits its mess. Duplicates send double emails. Blank owners mean leads nobody calls. Free-text fields make reporting impossible. An hour a month stops it piling up.

Tip. Put this in the diary as a recurring task with one named owner. Shared responsibility means nobody does it.

Monthly: duplicates and junk (20 minutes)

- ☐ **Review and merge duplicate contacts**
Use your CRM's duplicate tool. Merge into the record with the most activity.
- ☐ **Review and merge duplicate companies**
Watch for 'Pty Ltd' vs no suffix, and different domains for the same business.
- ☐ **Remove test and junk records**
Test submissions, spam form fills, 'asdf' entries.
- ☐ **Clear hard bounces**
Mark or remove contacts whose emails bounced. They hurt your sender reputation.

Monthly: completeness (15 minutes)

- ☐ **Every open deal has an owner, amount and close date**
Filter for blanks and fix them.
- ☐ **Every contact has a lifecycle stage**
Lead, MQL, SQL, opportunity, customer. No blanks.
- ☐ **Every new record has a source**
If source is missing, your marketing reporting is guessing.
- ☐ **Company records are associated**
Contacts linked to their company, deals linked to both.

Monthly: staleness (15 minutes)

- ☐ **Deals past their close date**
Update, push or close-lost them. A pipeline full of zombies lies to you.
- ☐ **Tasks overdue by 30+ days**
Complete, reassign or delete.

- ☐ **Contacts with no activity in 18+ months**
Review for archiving or a re-engagement campaign.
- ☐ **Owners who have left the business**
Reassign their records today.

Quarterly: structure (30 minutes)

- ☐ **Review custom properties**
Archive fields nobody uses. Fewer fields means better data in the ones that matter.
- ☐ **Convert free-text fields to dropdowns**
Industry, source, region. Free text can't be reported on.
- ☐ **Check form fields map to the right properties**
Website forms, landing pages and integrations.
- ☐ **Review user permissions**
Who can delete, export or import? Fewer is safer.
- ☐ **Check integrations are still syncing**
Look for sync errors in each connected app.

Rules to write down once

- ☐ **Naming conventions**
e.g. Deals: Company - Product - Month Year.
- ☐ **Required fields at each stage**
What must be filled before a deal moves forward.
- ☐ **Who can create companies**
Limit it, or use automatic company creation from email domain.
- ☐ **Import rules**
Every import is checked for duplicates and mapped to existing properties first.

CRM too far gone for a monthly tidy?

A Data and Database Clean-up (from \$4,500) fixes the backlog: dedupe, restructure, standardise and set the rules that keep it clean. Pairs well with HubSpot implementation.

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