

**DATA QUALITY—
UNLOCKING
CUSTOMER
EXPERIENCE'S
SECRET
WEAPON**

Table of Contents

- 03** Introduction
- 04** Organizational Data: Unlimited Potential, Restricted Utilization
- 05** Data Standardization: Creating a Solid Foundation with Required Fields
- 07** Data Cleaning: Field Mapping, Data Deduplication, and Integrity
- 10** Collecting Isn't Enough - Consolidate Your Platform
- 12** Data Standardization Best Practices
- 14** Make Your CRM Work for You and Achieve User Adoption
- 17** Conclusion



INTRODUCTION

Data—The End All Be All

The average sales professional only spends 54% of their job actually selling, the rest is filled with repetitive, administrative tasks that take time away from building relationships. The culprit? High-maintenance CRM platforms that don't help with information management, automation, and lack easy-to-use functionality. But it's not just sales teams that are subject to these setbacks—marketing, customer service, and finance are all limited by the lack of quality data within your CRM. To enhance your customer experience, you need to maintain data quality, improve interdepartmental data alignment, and consolidate data so the entire organization can see the same customer picture. Learn what you can do to increase data quality and one step closer to achieving a high-definition customer experience.

POTENTIAL

Organizational Data: Unlimited Potential, Restricted Utilization

Data—it all starts and ends with data. We want more. We want to extract insight from it. We collect it through every possible channel. We place value in data. Yet, there's a problem: We are only scratching the surface of the insight that could be extracted from that data. We collect tremendous amounts of data, but it's often incomplete, inaccurate, duplicative, and poorly maintained. The result is many organizations fail to glean useful information and a significant amount of data goes unused blocking a complete customer picture.

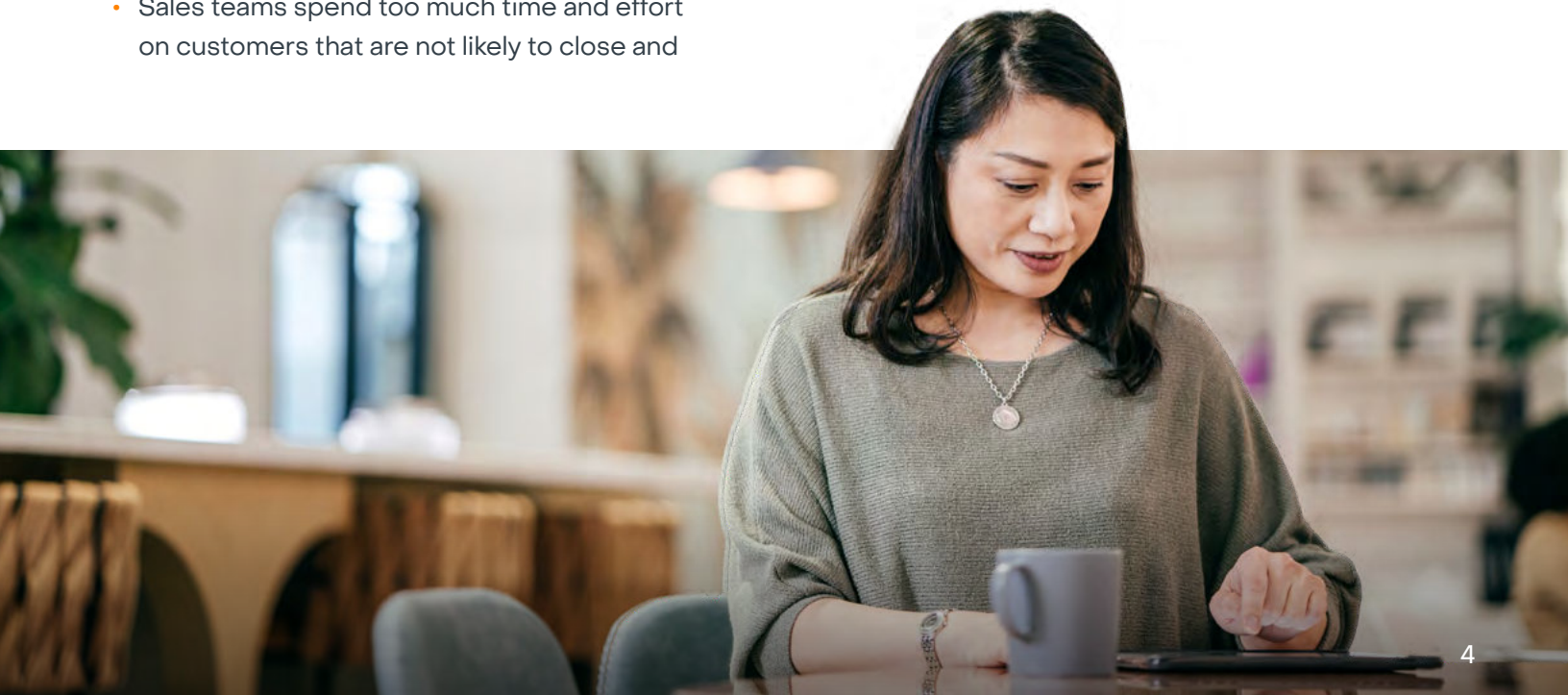
Businesses collect tremendous amounts of data. However, many organizations suffer from inaccurate data, too much data, or too little data—creating roadblocks, blind spots, and busy work for organizations. This not only affects the ability to deliver superb customer experiences, but cascades throughout the organization increasing budget waste and can even cost revenue:

- Marketers spend ad budgets in the wrong places because incomplete or insufficient data informed their demographic profile
- Sales teams spend too much time and effort on customers that are not likely to close and

potentially miss the deals that will

- Customer service teams are unaware of customer history and thus ask for repetitive data, causing customer frustration
- Finance is unable to see upsells and cross-sells after the initial deal closure missing revenue
- Wrong products or services are delivered to the customer at the wrong time and in the wrong quantities

The list could only go on, but the consequences of poor data is clear: Data quality and management is essential to your organizational success. When your organization needs contextual information at their fingertips, customer relationships and quality assurance suffer. To enhance your customer experience, your internal processes must consider data quality and how data is used to create memorable customer experiences. In this guide, we will not only cover the best practices for achieving and maintaining internal data quality but provide prescriptive steps to strive for the next level of customer experience through internal data.



Data Standardization: Creating a Solid Foundation with Required Fields

Required or mandatory fields are an excellent method to reinforce proper data quality protocols for your CRM platform which is highly impactful to customer experience. These fields feed the information to drive process automation, enabling segmentation and providing data input for reports and dashboards. As such, these required fields are essential to the effectiveness of marketing, sales activities, customer service requests and internal reporting.

What fields do you need to truly understand your customer or prospect? While every organization varies in the level of detail needed, you should have required fields for both account level and contact/lead level. This is the baseline that enables marketing and sales to target and effectively track conversion rates. The following fields are the basic list of required fields that your company should have:

- Contact Full Name
- Company Name
- Lead Source
- Lead Owner
- Phone Number
- Email Address
- Location (Country, State)
- Company Size
- Product Interest



By making important fields mandatory in your CRM platform, you also ensure that customer or lead information will be properly loaded into your system. Required fields ensure better tool usage:

- Significantly reducing missing essential data.
- Driving processes for automation.
- Enabling segmentation for marketing to create target lists.
- Providing input for reports or dashboards.

When data is NULL in these fields, the effectiveness of collected data is drastically decreased which ripples throughout every department within the organization. Required fields ensure organizations are fully informed of customer or opportunity account information and helps tailor marketing, sales, customer service, and customer experience strategies. These fields cannot be left blank. The data for these fields must be entered within the CRM to better understand every account which makes a platform that does the work for you valuable to any organization. Automated and intelligent data population or manual field entry by internal employees is key to optimizing the data within your CRM system.

To determine which fields are required in your CRM, consider your ideal customer. Whether you're a relatively new company or you are a well-established organization, your Ideal Customer Profile (ICP) is the place to begin to standardize your data and increase quality. For example, if you are a company selling Software as a Service (SaaS), knowing aspects like the ones below about your customers are mandatory:

- The size of their company or how many people will be using your software.
- The allocated budget for the software investment.
- Where is the company located?
- What type of product is the lead interested in?
- The company name so you can do proper research to see which of your portfolio products or services is a good fit for your lead.

Mandatory fields will vary depending on whether it's initially input within your CRM platform or marketing automation and the type of contact record. When defining your mandatory fields consider including these fields as the buyer's journey progresses:

- Pipeline Value
- Quantity
- Total Opportunity
- Decision Makers
- Customer Service Manager
- Account Manager
- Use Case
- Competition

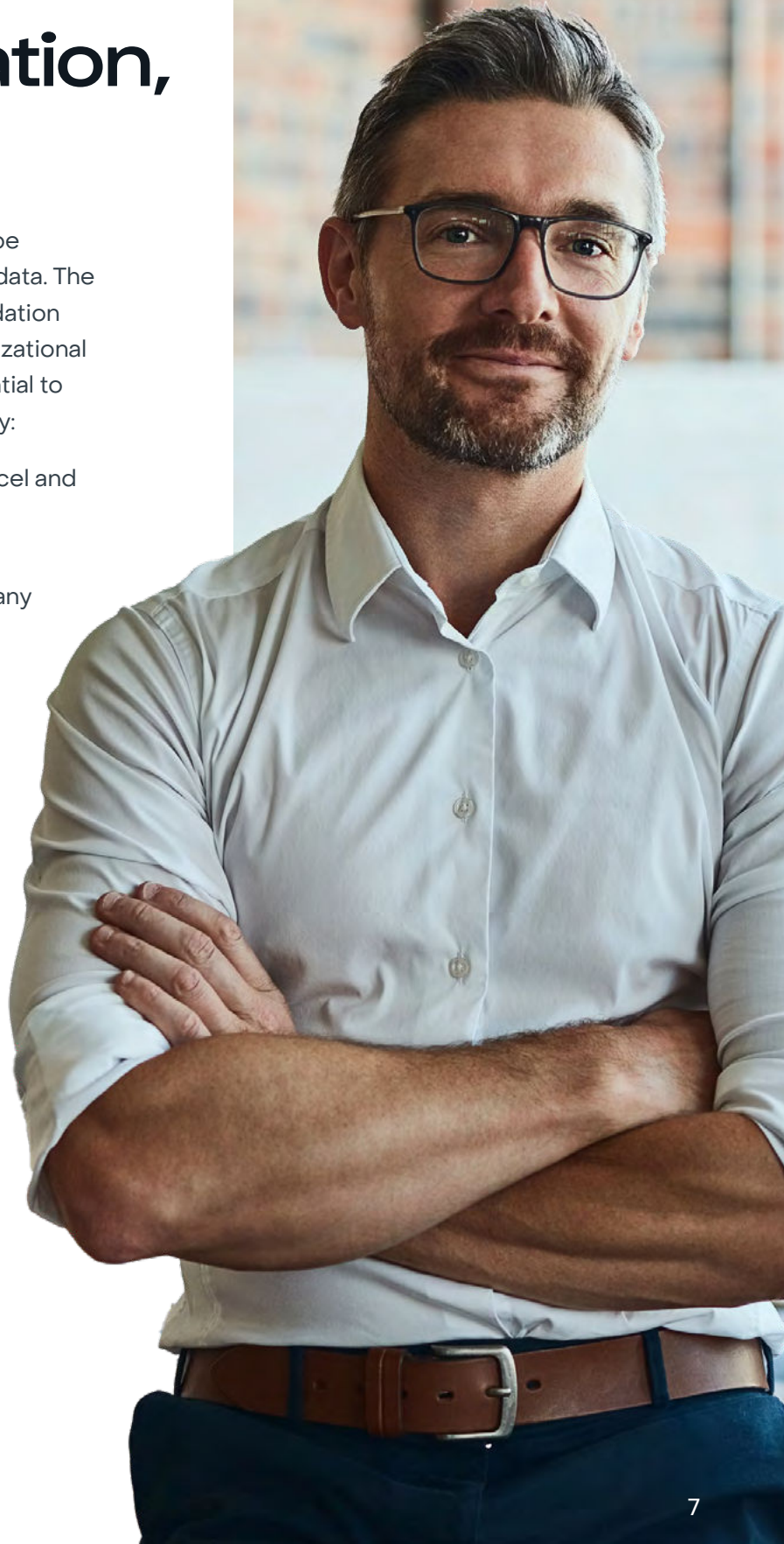
Simply put, the basics included within your required fields set a standard within your organization for data quality. It's important to note that when setting required fields, your organization should only focus on the core set of data required for a deal to progress. No employee likes the busy work of entering required attributes like eye color or marital status within their CRM because it creates headaches and slows down processes. This will also help to increase internal adoption rates, thus, productivity across your teams.



Data Cleaning: Field Mapping, Data Deduplication, and Integrity

Now that you've outlined what fields you need to be successful, it's time to figure out the gaps in your data. The creation of required fields provides a strong foundation for your internal data but ensuring that your organizational data is not duplicative or out-of-date is also essential to data integrity. Common problems can be solved by:

- Verifying data internally by extracting it into Excel and manually reviewing it
- Addressing duplicate data when necessary
- Updating data like addresses and other company and employee information
- Undertaking an active initiative to complete records with missing data, look for duplicates, and update incorrect information
- Distributing responsibilities for updating the data internally through:
 - Running a report of desired data for clean-up
 - Using tags to assign records that need correction to specific users
 - Utilizing third-party vendors who provide data cleansing services



Identify Recent Data and Information

The most up-to-date customer data can usually be found within an organization's ERP or accounting systems. The largest volumes of contact data will be in the CRM system. Unfortunately, CRM data comes with a major issue: the lack of accuracy. The contacts added into the CRM tool over time by sales and marketing teams are typically the most troublesome because these are manually input into the system and prone to human error. An average database may hold thousands of companies and individuals that were once prospects, but the sale never closed.

It would be beneficial for sales and marketing teams to verify each record for accuracy. Depending on the number of records, this process can be extremely time-consuming, but can also go a long way in ensuring that your CRM system is as clean and relevant as possible.

Set Up a Set of Data Deduplication Rules

First, come up with some rules. One common rule is that there should only be one email address per contact, assuming everyone has an email address within your records. For those that don't, it may be necessary to come up with another rule, such as using first name, last name, and phone number to identify duplicates. Ideally, multiple duplication-checking strategies are employed.

Once the duplicate rules are identified, they should be applied by outlining what it would look like after the data is migrated and what duplications exist. It's important to remember that the rules are not going to be perfect unless the fields in question are always required and filled in correctly. Complete accuracy is difficult to achieve and, sadly, companies will often need to settle for 'close enough.



Pay Attention to Field Mapping and Data Formats into Your CRM

Once you've outlined what fields you need, you should think through mapping the fields to your CRM. This involves setting up sales and marketing processes that will ensure that data is captured any time a new lead or contact enters your CRM system.

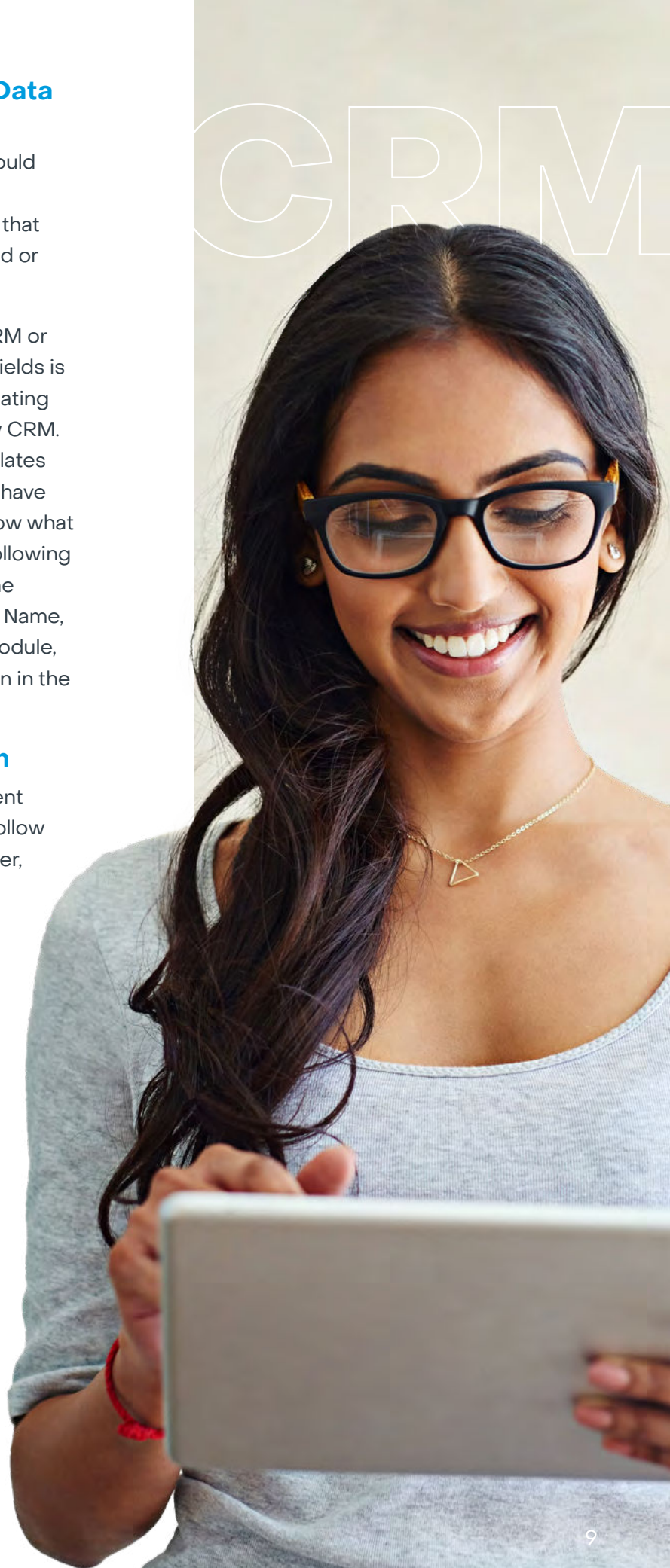
If you are in the process of implementing a new CRM or are migrating your data, the best way to map new fields is by exporting it in CSV format and manually manipulating the format so it matches the one used by your new CRM. Some CRMs even provide sample import file templates for each module (e.g. Accounts and Contacts) that have the ability to import. These CSV files will let you know what mapping protocols and standards you should be following in the process. The import file template includes the appropriate header rows for all available fields (e.g. Name, Office Phone, and Email Address) in the specific module, as well as sample data showing how the information in the file should be formatted.

Identify Recent Data and Information

Either way, remember that each module has different fields and mapping protocols, so you will need to follow through with this process for each of them. However, you will ensure that, in the end, all data is accurate and can be properly imported into and used by your CRM. Remember that you will need to create separate CSV import files for each module you plan to clean up in your CRM.

An average company may have around 50 fields per module to map, while some larger organizations will have hundreds. After the map is agreed upon and any necessary modifications are made, you have a clear guide to what data will be migrated and how to proceed.

Any data transformations needed should also be included in a mapping document. For instance, if a data field was in a specific date format, it may need to be converted into another date format to fit the target CRM system.



Collecting Isn't Enough - Consolidate Your Platform

Data consolidation is the process of collecting data from multiple sources into a single system. Data consolidation also plays a significant role in ensuring data integrity. The methods used in the process help eliminate inefficiencies such as data duplication and elevated costs associated with depending on multiple data sources.

The process is beneficial to enterprises because it facilitates access to data and information from a single entry point, while boosting analysis and interpretation capabilities.

Why Data Consolidation Matters

Regardless of business profile, companies gather information through customer interactions. The process is mainly carried out by customer-facing teams. Although many businesses see these interactions as a matter of personal relationships, brand image and customer experience exclusively, these interactions are also a data issue. This matter of interest to everyone in your organization.

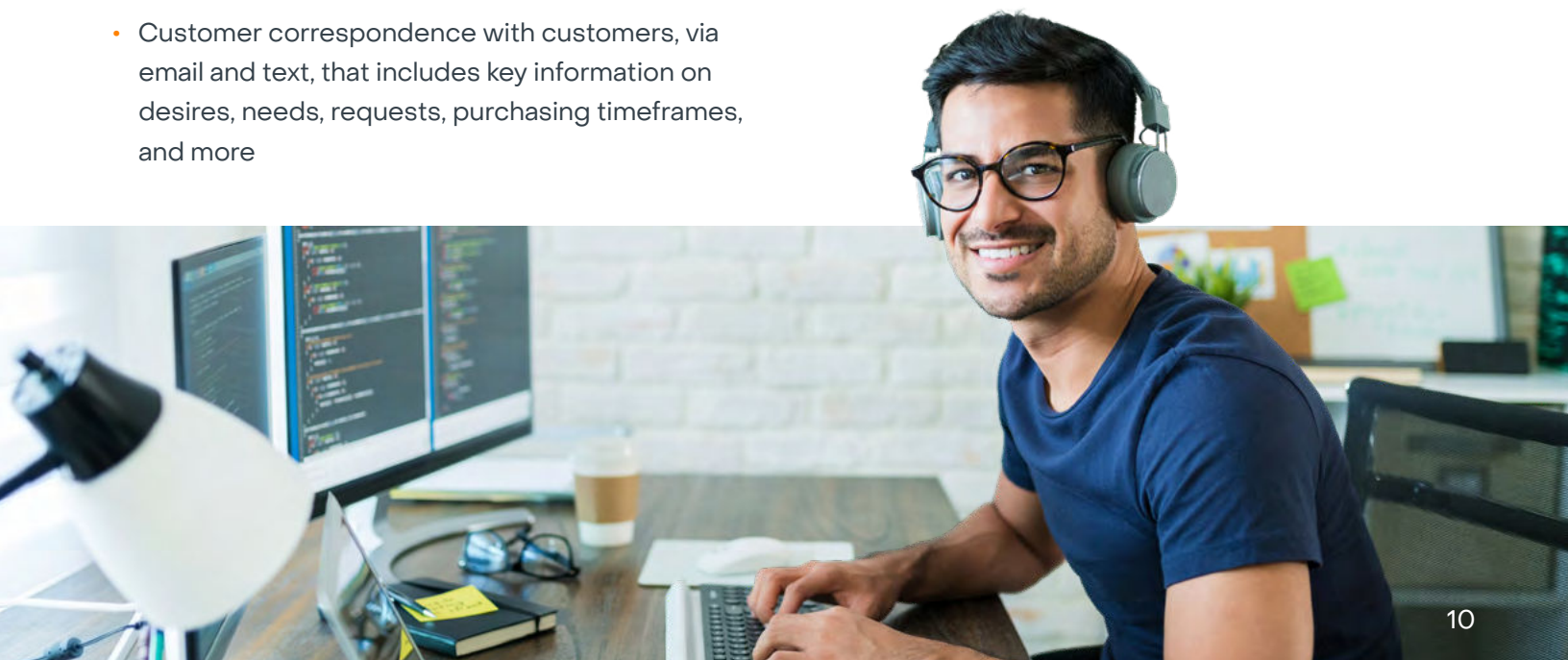
Your customer-facing teams not only need rich data to sell or provide service while having insights on each individual, they are the ones best positioned to collect much of it:

- Customer correspondence with customers, via email and text, that includes key information on desires, needs, requests, purchasing timeframes, and more

- Customer conversations, by phone, chat, or in-person, that may include information that can update and inform your customer's profile and/or buying history
- Customer requests, complaints, and demands that shape customer satisfaction—information that's vital to sustaining your relationships over the long haul.
- Information on customer interests gathered from marketing interactions (e.g. form completions, webinar attendance, email clicks, landing page views etc.)

In all the instances listed above, customer interaction data will usually be found in dissipated, siloed systems, specific to each department. But effective use of data also means you have to make departmental-specific information available and ready to use at a company-wide level.

On the backend, team managers need access to current interactions data that can be aggregated, analyzed, and compiled for a variety of administrative responsibilities which is why it needs to be consolidated.





Data Consolidation Best Practices

Modern customer experience platforms have evolved since the day and age of being merely a data storage system. Some systems, like Sugar, can be easily integrated with your existing software suite using out-of-the-box integrations, and can facilitate the migration and consolidation process. We recommend resorting to such solutions first. However, most traditional customer experience platforms today are not built to truly consolidate processes and data from all of your organization's tools into one view. If you are limited by your customer experience platform's capacity to migrate data, you can also seek another effective migration method, through an ETL tool. However, ETL tools are complex and difficult to leverage by companies with no internal IT departments. In spite of this aspect, companies can follow several steps and best practices to ensure proper data consolidation.

Start by comparing your data across multiple sources and targets. The first step to successful data consolidation is accounting different data types, character type sets, and human error in the process.

1. Syncing Up Data Types

Data coming from multiple siloed sources will most certainly have different types and formats. While this is normal, tackling this issue poses several challenges. For example, while some data sources may include a time component in a date format, your target system might not. In other cases, binary data cannot always be represented using identical data types. That's why you want to make sure that different data types are converted from your source to match the ones in your target databases.

2. Character Set Conversions

Global companies, especially, struggle with data consolidation. Teams scattered globally also involve language barriers. But while language barriers can be somewhat overcome with translation tools, different character sets are more challenging to tackle. Most languages using Latin characters are single-byte characters, while the characters used in languages such as Chinese or Japanese are double-byte characters. Consolidating databases from teams around the world into a single system becomes difficult in this case. However, standardizing on an all-encompassing character set like Unicode for all data sets is a way to ensure that you can store all data irrespective of origin and character set.

3. Accounting for Human Error

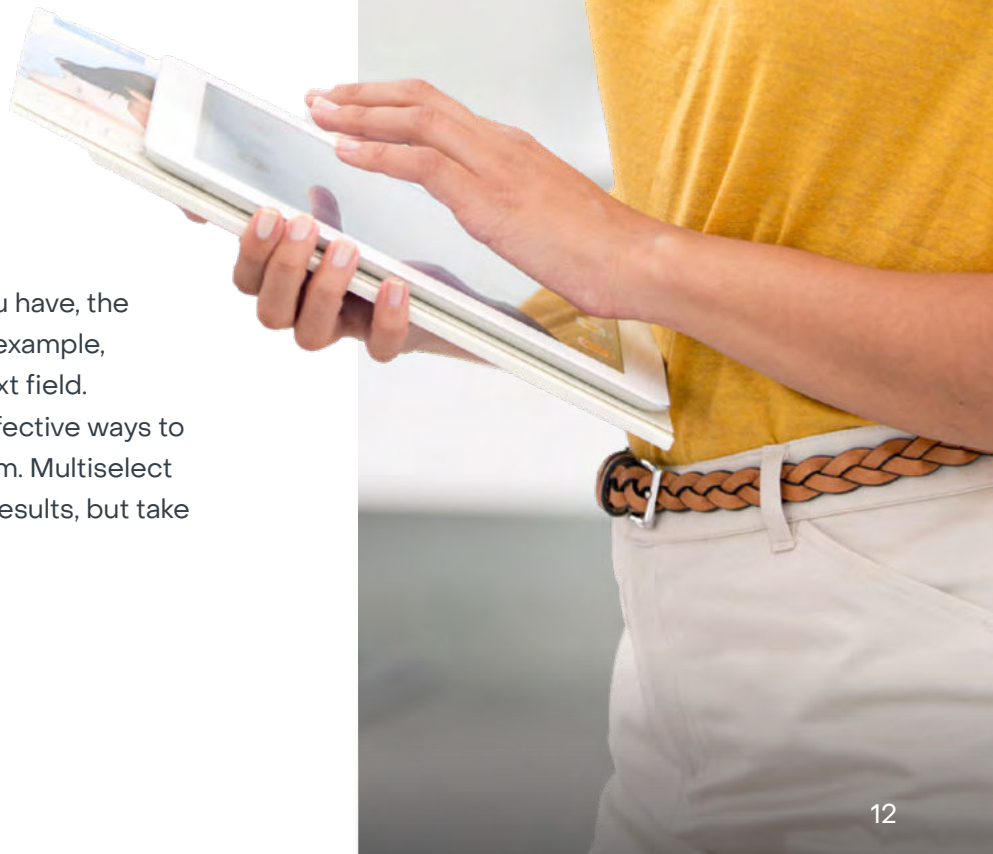
The new, consolidated system is more vulnerable to human error than we would like to admit. Accidentally deleting records or corrupting them is a common issue in databases. One solution would be to implement numerous safeguards on production instances. But these cases can still emerge in spite of ownership and accountability rules and in spite of internal safeguards. The best way to ensure higher protection against human error is by setting in place more stringent protection protocols and procedures. Companies that successfully master data consolidation and protection have in place methods of keeping copies of their data. This can be achieved through traditional replication and through Big Data replication. Regular MySQL system backups are another good method of ensuring data integrity in case human error scenarios emerge.

Data Standardization Best Practices

Your CRM is only as valuable as the data that you feed it. Avoiding poor-quality data will help you ensure that all records in your CRM are valuable and can be leveraged to consolidate your CRM and customer interactions. The data you load into your CRM upon implementation is equally as important as the data that enters your CRM post-implementation—that means you need to enable your end-user. However, the data that will be introduced in your CRM after implementation also matters. To meet both these goals. Here at Sugar, we have a saying. Manual data entry is a last resort. What can you do to streamline data entry processes for your end-users to ensure they are inputting accurate information that is up-to-date and complete?

Outside of utilizing [artificial intelligence tools](#), the quickest fix for this issue is data standardization. In modern CRM tools, this can be quickly achieved by standardizing common fields. There are a couple of ways field standardization can be achieved: Utilizing predefined values in dropdown or multi select fields in lieu of free text fields for elements such as Lead Source, Industry, Location, Status, etc.

The more custom fields and data types you have, the more complex the process becomes. For example, it may be easy to import everything as a text field. However, text fields are one of the least effective ways to capture information inside of a CRM system. Multiselect or dropdown fields will yield much better results, but take more time to implement.



Overall, the biggest mistake would be not following the framework laid out above. This would result in incomplete data, inefficient processes, and users less likely to adopt the new system.

Creating standardized options will:

- Improve data quality
- Allow for better reporting
- Allow for segmentation for marketing automation

Using standardized fields will also facilitate data management. CRM tools go beyond data storage. Data analysis and interpretation are the key factors that determine how valuable similar tools are. However, the entire process can be easily defined in two words: Data management.

“Data management is the process of collecting, storing, analyzing, and interpreting data. Ideally, all these steps have to be managed in an efficient and cost-effective manner.”

There is a series of best practices in the industry that all companies implementing CRM tools should follow to ensure high data management standards:

- **Employee training.** Ensure that all employees that interact with your data fully understand data management and how to efficiently achieve it. A good method to train employees in data management would be to design dynamic courses that take a look at historical data and its implications over time in terms of new business opportunity assessment, KPI development, and more.
- **The use of validation tools.** Data validation is an essential part of any data handling task whether you're in the field collecting information, analyzing data, or preparing to present data. Although data validation can be difficult to achieve manually, certain tools will help you streamline and simplify the process.

- **Data monitoring.** Frequent data audits are a good way of ensuring high data management standards.
- **Data prioritization.** Now all data is created equal, and before investing time and resources in different data types, it's best to assess which data is the most important and relevant to your teams and business as a whole. Your teams should know that data request context lowers the risk of providing bad or incomplete data, which then lowers their risk in making decisions that hurt the business.
- **Avoiding data fragmentation.** Siloed data prevents your teams to prolifically collaborate and your company to achieve its full potential. This type of issue is most frequently encountered in companies where fragmented software is present. The quickest fix to this issue is proper implementation of flexible, articulated CRM tools and integrations.
- **Data visualization.** Having a visual representation of your data is sometimes just as important as having access to data. Although this is not always the case, high-performing business automation software also have incorporated data visualization features.

Make Your CRM Work for You and Achieve User Adoption

Understand User Adoption

User adoption seems like a different project to tackle all together, right? In some sense, you're right; however, user adoption is critical in maintaining up-to-date, accurate data in your CRM. Why? Because you've got end-users that are interacting with prospects and customers all day every day, and what they are inputting (or not) into your CRM impacts your view of your customer over time. In terms of data management, it's worth noting that user adoption rates can influence data quality and consistency tremendously. Keeping records updated with the latest information, and most importantly, having employees to tackle this, is closely related to securing data quality.

Before jumping in feet-first to tackle user adoption, it's important to establish what we mean when we say user adoption in this context. How are you going to measure adoption? While it may seem cut and dry, depending on the type of project, there may be different metrics, standards, and definitions of adoption. Below are a few sample metrics that could be used to measure it:

- **Actual system use:** Number of days between logins
- **User satisfaction:** Usability survey results
- **Management satisfaction:** Quality of management reports and metrics
- **Improvements in business metrics**
- **Process Compliance:** Measure the percentage of leads correctly handled
- **Data Quality:** Opportunities with correct close date
- **Data Volume:** Number of contacts created

For CRM projects, user adoption could mean a certain percentage of total users have logged in each day or each week; or that X number of users correctly updated a record in the first month; or that there was X number of new contacts created this week. How it is defined should be unique to your organization and in line with your business goals for the project.

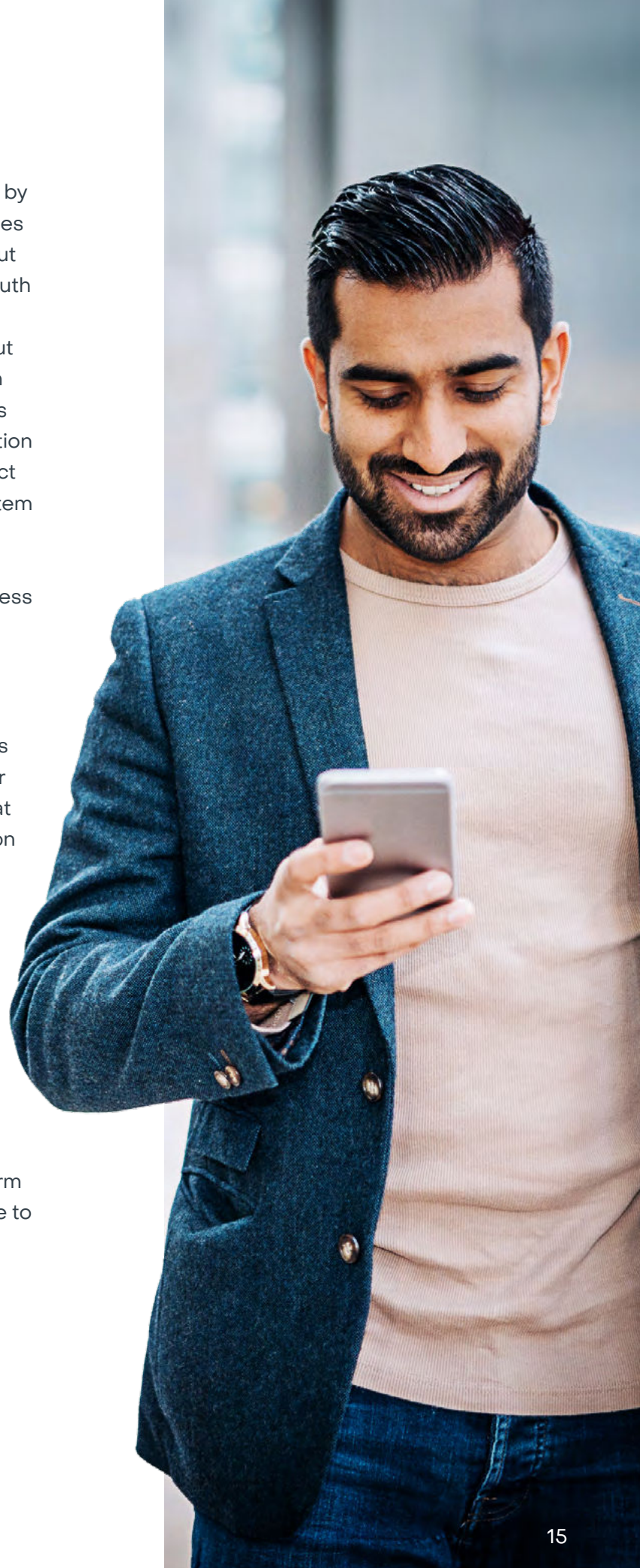


Establish Data Quality Procedures

Over time, databases tend to get dirty, no matter how many protections you have set up to prevent it. There will be people who take shortcuts when entering data by abbreviating or providing limited information. Duplicates will be entered into the system, one of which will be out of date so it's impossible to tell which version of the truth to trust. It's important to accept that data quality is an ongoing initiative from the start and start to think about what should be done to periodically identify and clean data. You also need to think about what data standards should be put in place for users as they enter information in the various sales stages, whether it's a lead, prospect or customer. Decide how you can ensure that the system has proper mailing addresses, valid email addresses, in-service phone numbers, and the like. This may be accomplished through a subscription to a postal address verification service and/or an email validation service.

Automation

Scripts help to compress the human time needed for repeated conversions. Make sure to utilize SQL scripts and batch routines to automate whenever possible for your workforce. However, this is not the only solution at hand for companies trying to boost employee adoption rates through automation. [Artificial Intelligence \(AI\) applications within databases](#) help you automate the data-entry process, too. This will help with adoption/usage. Customer experience platforms typically have powerful automated workflow features. Design and implement business processes that facilitate and enforce platform usage and user adoption. Processes such as customer onboarding, opportunity wins, customer service escalations, and contract renewals need collaboration between different users. Let your platform orchestrate these processes and your users will come to depend on it for daily functions.



Augmentation

As mentioned previously, Sugar believes manual data-entry is a last resort. Consider how data enrichment tools may add value to your organization and make it easier on your users to maintain data integrity. Tools like Sugar Hint use Artificial Intelligence to automatically gather and import data into your platform to save your users time, eliminate human error and ensure you have all of the information you need at your fingertips.

Accountability

Consider creating a user adoption report or dashboard. Count user logins, the creation and update of new contacts, accounts, customer service cases, opportunities, etc. Let everyone know who the top power user is, who created the most contacts, sent the most emails, and has the most calls scheduled. This helps to gamify the usage of the system, assigning points to key actions that users perform, creating scorecards on how users are performing those actions, and accumulating points. Creating leaderboards and incorporating them into users' compensation plan, employee reviews, or bonus eligibility are creative ways to increase user adoption, especially for sales reps, who are often competitive by nature.

Tips & Tricks

While the advice above will help you implement proper education and adoption rates, it's important to also pay attention to several other aspects:

- Make sure that users realize they are responsible for the data. Use an "Assigned User" field: when records are assigned to a single owner in a platform, then one person is responsible for the quality and completeness of that record.
- Ensure you keep the number of admin users at a minimum. Such users can load custom code into the system, and sometimes, they can be inexperienced (or compromised) enough to cause data accuracy problems. Regular users, in spite of human error, are less likely to compromise your databases.



CONCLUSION

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The Essential Role of Data Quality and Integrity

Data quality and integrity play an essential role in ensuring company growth and proactive, personalized customer interactions. Data will dictate strategic moves and decisions, and will determine how you interact with leads, opportunities, and customers in the long run. However, the customer experience platform that you choose as your data warehouse will play an equally important role.

At SugarCRM, we aim to make data and the platform do the work for you, whether you're in sales, marketing, support, or virtually any other department, by leveraging artificial intelligence (AI) and the power of predictive analytics.

GET DEMO

About SugarCRM

SugarCRM is how marketing, sales, and service teams finally get a clear picture of each customer to help businesses reach new levels of performance and predictability. Sugar is the CRM platform that makes the hard things easier.

Thousands of companies in over 120 countries rely on Sugar to achieve high-definition CX by letting the platform do the work. Headquartered in Silicon Valley, Sugar is backed by Accel-KKR.

To learn more visit www.sugarcrm.com or follow [@SugarCRM](https://twitter.com/SugarCRM).