

5 steps to

CRM nirvana

*An introductory guide to CRM cleaning and
how to succeed at it.*

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Don't just read these, implement.

Research:

When adding new data to your CRM manually or through extensions, searching and Googling for the record before adding one will help avoid many duplicates and sorting issues in the future, do a quick search online to check for the company details and make sure you are adding the most accurate info available.

Standardize Details (Names, emails etc):

Don't complicate and avoid using company legal structure for abbreviation like LLC / LLP / Inc etc.

Avoid adding domain name extensions in company name, for e.g .com, .net, .org, etc. to the company name

Write proper full name for companies, like The Next Web and not TNW (TNW can get confusing if you have over 2000 records)

Use proper formatting for names, for example it's FlipKart, and not flipkart or Flipkart.

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Setup rules for CRM and follow it:

Make sure to have standard rules for data entering your CRM, for example use first letter of names in caps, it helps with standardisation of your CRM.

Don't add middle name with last name, if there is no place for middle name, skip it.

Don't add salutation in the first name field, setup rules and follow it.

Standardize formats (organize):

Don't complicate things, setup rules in place for what to add / what to avoid, like for example avoid using street / ave / parkway in the address field unless it is a part of the address.

Mark suite number bold or with a different colour to make it noticable.

Setup a meeting to discuss what is going to get into your CRM, a 3 hour meeting with save you tons of money in the coming years.

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Basic rules:

Ensure your CRM is upto date and accurate, ensure it is in sync with your email automation provider and leads list to followup with in your CRM.

Experiment with 5 CRM systems before selecting the one, don't jump to conclusion by reading online guides.

Data is your asset that your company holds, imagine a day without having sales leads, I know you can't, keep your CRM clean, ensure it has everything it deserves.

Even with these basic rules that everyone can follow, your company might still need a [data cleaner](#), you can test our services by getting our no obligation trial to test how it can help your business, there is nothing to lose here.

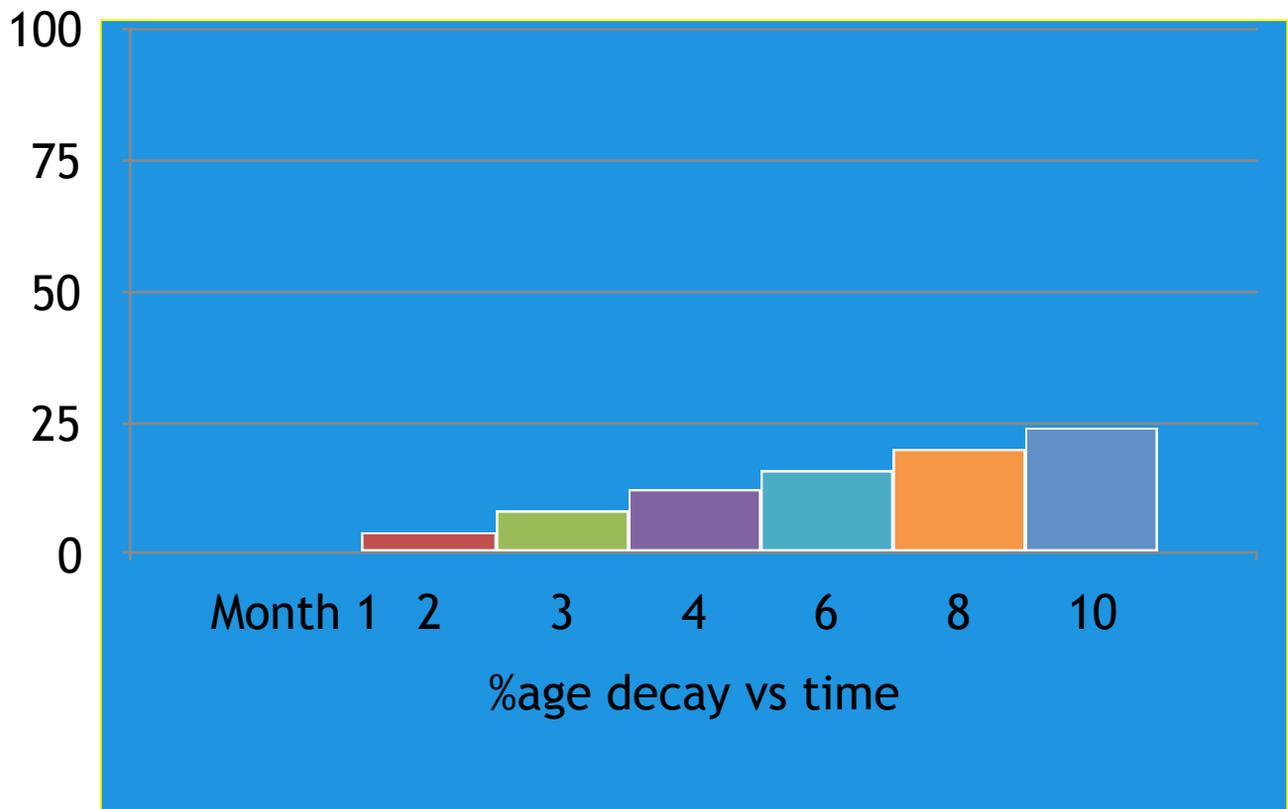


Chart showing data decay in %age vs time, as you can see in this interactive chart, your data decay is almost 40% in 10 months.

Considering that we started with the cleanest data possible with 0 base decay.

“ The price of light is less than the cost of darkness. ”

Arthur C. Nielsen

Hire the

Data cleaning experts

There is nothing to lose here, our work is backed by our 120% money back guaranty. 100% refund + 20% for the hassle (if it doesn't work out for you)

Get free trial

