ZOHO CRM

Five Ways

To Maintain Clean and Accurate Customer Information

Has it ever happened, that you make a follow-up call, only to find out that another member of your team had already contacted the customer?

That would be a little embarrassing but where was the confusion? After cross-checking you clearly noticed that there was no record of a call being made to the contact, but there sure was a duplicate contact, assigned to another sales rep!

Inaccurate or incomplete CRM data often hamper sales and marketing performance. Many of your contacts would have changed their phone number, email address or even their company, leading to an accumulation of redundant and incomplete data in your CRM. So how are you going to maintain clean CRM data? We all realize how important it is to add clean data in the CRM system and not just that, to avidly maintain it too! Help yourself with these 5 tips to not only get your CRM system under control but also to save time and headache down the road.

Tip #1 Maintain Complete Data

Tip #2 Avoid Entry of Duplicate Leads & Contacts

Tip #3 Merge Existing Duplicate Records

Tip #4 Maintain a Style Sheet

Tip #5 Use Roles for Security

#1 Maintain Complete Data

Believe it or not, incomplete information is not a good sign for data quality. The CRM account requires you to fill in numerous fields that are mandatory. It's time-consuming! And as a sales rep, that becomes a reason for you to neglect proper data entry.

The best way to deal with this is to **set important fields as mandatory** such as name, email address, phone numbers, and address. So, determine the fields that are most important for complete information and encourage users to fill in those important details.

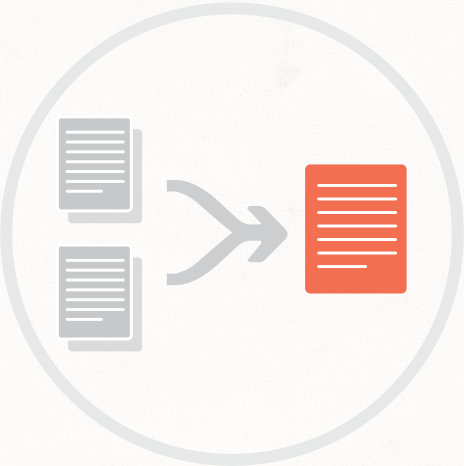
Ask yourself one question: How complete are my records?

#2 Avoid Entry of Duplicate Leads & Contacts

Every individual has a unique email address. If two entries in your contact list have the same email address, then you have duplicate records. One simple trick to prevent duplicate records is by comparing the email address of people.

While adding a lead/contact, Zoho CRM gives you the option to check whether the newly added record already exists in your CRM account. Now, this will definitely save the effort of going through the records for duplicates.

#3 Merge Existing Duplicate Records



Preventing duplicates work great when adding new contacts but what about eliminating duplicates from your existing data? Duplicate records are not necessarily identical. Let's say, two contacts have the same name, email address and company name but one has a phone number that is not found in the other.

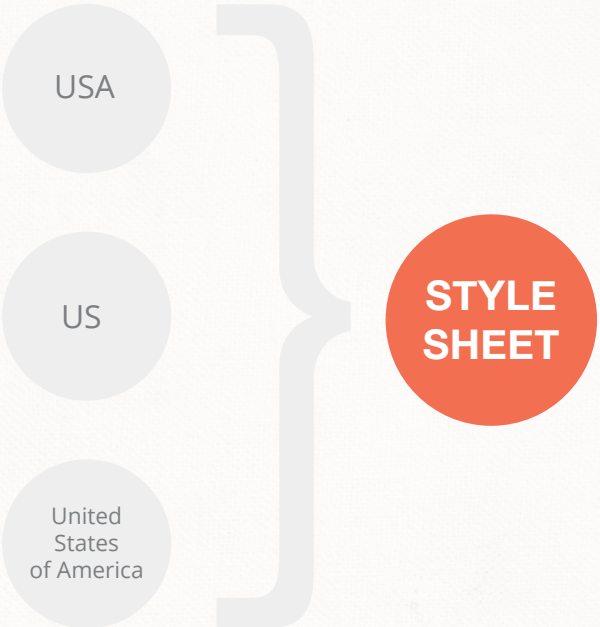
This is sometimes frustrating as some of the crucial information that you need is scattered in both the records. In that case, instead of blindly deleting one record and potentially losing important data, merge the information into one contact.

what about eliminating duplicates from your existing data?

#4 Maintain a Style Sheet

While automation does most of the work, human efforts are essential for data quality. One way to make data entry easy and maintain consistency, is by introducing naming conventions. For example, a country's name is sometimes used in different formats: USA, US, United States of America.

Having a standardized format for such data helps you generate accurate reports and filter records based on the exact criteria. Follow a style sheet with a list of abbreviations and standard data entry formats for address, company names, designations, etc. Pre-defined drop-down values also helps a lot in eliminating a small part of the problem.



#5 Use Roles for Security

With data pouring in from several sources and multiple users accessing it, maintaining a clean CRM database is not that easy. One best practice is to restrict access to data in your CRM account.

Define Roles that will help you control the access rights of users while working with CRM data. That way, users will modify only those records that are relevant to them.

You need additional permission to edit this contact. Please contact your administrator.

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