Data Hygiene Guide

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Contents

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Introduction

When you think of data, you may imagine industries driven by numbers and statistics, like finance and STEM. While not solely reliant on Math, marketing is still heavily dependent on information to achieve campaign goals. This is especially true in the modern age of digital marketing, where data is more valuable than gold.

Equally important is the quality of data at a company's disposal. Information's no good if it can't be leveraged to drive sales. Enter data hygiene. What is it? Why do you need to care? What advantages does it offer? We've got the answers to all those questions and more.

We'll also walk you through how to audit your data to see if it's up to scratch and explore how you can improve your data hygiene in concrete ways. **Let's get started!**

What Is Data Hygiene?

As the word "hygiene" implies, data hygiene is all about keeping your data clean. This includes information about opt-in leads and prospective customers, current clients, sales or purchases, vendors, and suppliers. Data hygiene refers to the processes used to make certain that data is valid and reliable[1].

Good data hygiene is achieved by regularly updating records and retaining only those that are useful. Verifying data's validity and guaranteeing that figures and details adhere to predetermined formats and standards are also crucial aspects of data hygiene.

Any data that's outdated and irrelevant must be removed from the database, including duplicate and inconsistent entries. Data hygiene also entails checking that all databases are safe and secure.

Practicing good data hygiene ensures that customer details are accurate, relevant, consistent, and complete.

Why Is Data Hygiene Important?

Maintaining good data hygiene is vital for reaching your marketing goals[2] because clean data helps you:

— **Reach intended consumers.** Your marketing messages, such as emails, are directed toward the appropriate audience and the relevant recipients get them.

— **Enhance lead generation.** It's easier to follow up on potential consumers when you know their contact and purchase details are correct.

— **Improve brand reputation.** Organizations are held in higher regard if the right customers are reached and communication between them and the company is seamless.

— **Drive more sales.** Better targeting and enhanced comms lead to greater conversions and purchases.

— **Increase profits.** Naturally, higher sales numbers mean elevated revenue generation.

— **Reduce inefficiencies.** Working with bad data results in wasted time and effort, which slows down operations. On the other hand, clean data allows organizations to improve their productivity.

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The Benefits of Good Data Hygiene

It goes without saying that good data hygiene is advantageous. More specifically, up-to-date and accurate data enables companies to:

— **Report more accurately.** Cleaner data means better data analytics for sales and marketing efforts, which is essential for demonstrating marketing success to stakeholders.

— **Save money.** Working with good, worthwhile information means fewer squandered resources and minimized expenses in the long run.

— **Adhere to regulations.** Many industries require organizations to comply with standards on data to ensure their data security is robust. Failure to meet compliance requirements can result in lofty fees and penalties which can severely impact a company's bottom line.

— **Work more efficiently.** Having a standardized set of data hygiene processes helps keep all relevant employees on the same page and prevents issues further down the line.

Data Hygiene Best Practices

Now that you understand what data hygiene is and why it's important and beneficial, you may be wondering how you can actually keep your data clean. In general, you should:

- Regularly audit[3] and clean data. This means combing through your various databases at least once a month.

- Remove old or inactive data from the database. Slimming down your contacts to only those that will yield results will prevent many headaches.

- Check for repeated data, and merge or remove duplicates. Sometimes, an entry will appear more than once, which can complicate following up on leads and reporting.

- Implement data validation rules, define data fields, and create formatting standards. In doing so, you'll create uniform data that will be easier to utilize.

- Set up automated data cleansing processes. Automated cleaning tools and platforms can do much of the above for you (but it's still worth your while to do manual checks).
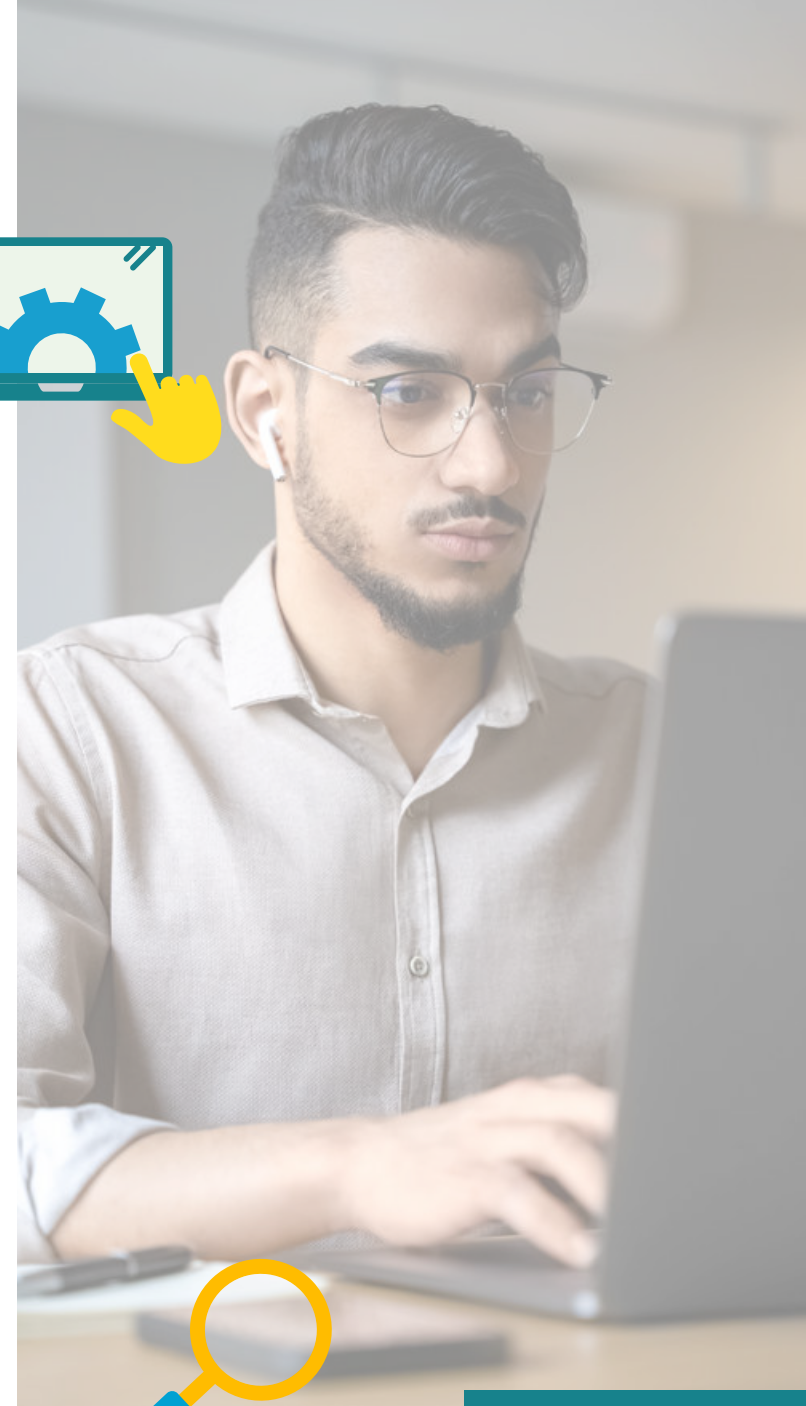
The Most Common Data Hygiene Challenges

There will inevitably be obstacles along the road to good data hygiene and it's essential to be aware of and correct them to mitigate their impact. They include:

— **Duplicates.** Repeat entries commonly occur when people fill in contact forms multiple times, or maybe your CRM or another digital platform captured information incorrectly. It's best to delete or combine these.

— **Incomplete records:** Some users tend not to share all their information. Reach out to them to fill in the blanks. If it's a sales software issue, you may need to revisit purchase histories manually.

— **Inactive or old data.** Often, leads will go radio-silent for no apparent reason. Remove these contacts, or try to re-engage them.

— **Unverified data.** You might not have checked how accurate some of your entries are, especially if they belong to people you haven't contacted. Set aside time to confirm their validity.

PART 7

Tips For Overseeing Data Hygiene at Your Organization

If data hygiene is new to you and your business, you'll have to take some extra steps to ensure that everyone is on board and working in harmony. These may look like:

- Implementing security measures. This includes restricting data access to only those who need it, instituting password policies so that only authorized people can see and use data, and regularly backing up your files.

- Providing training on data hygiene best practices and CRM system usage for users who must utilize databases.

- Investing in automated data cleansing tools to streamline and fast-track data hygiene efforts.

- Establish data governance policies setting out who may use data and for what purposes.

- Employ third-party data services that can assist you along the journey to better data hygiene.

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How To Conduct a Data Hygiene Assessment

If you're unsure about your current data hygiene status, it may be worth doing a database analysis. Follow these steps for the best results:

1. Identify key data elements by highlighting the data that's crucial for your business.

2. Define your review criteria, such as data completeness and recency or formatting standards.

3. Generate reports, such as data profiles to see if your database meets your criteria.

4. Map out current data processes (e.g., how you capture, store, and use data).

5. Pinpoint any inconsistencies or problem areas in terms of data quality, consistency, and accuracy.

6. Determine how you'll resolve the issues (such as creating data capture procedures).

7. Codify new courses of action or methods regarding data handling in a policy that you'll make available to the applicable employees.

8. Establish guidelines and rules for future data maintenance and assessments.

9. Monitor your new new plan and make adjustments as necessary.

How Agile Education Marketing Can Help

Coming to grips with proper data hygiene and management can be challenging, to say the least. If you're relatively inexperienced in this realm, you might find that you need help. Fortunately, outsourcing your data processing and maintenance is a viable option for businesses coming to terms with data hygiene[4].

Our File Matching, Data Hygiene + Append data service makes it easy to update fields, fill missing entries, remove or merge duplicate ID, mitigate inactivity, and flag account closures.

Beyond data hygiene, we offer a range of data services designed to help you optimize your database to get the best return on investment and propel your business forward.

Ready to get your data in order and put it to use? **Contact us today to start your journey toward data success.**

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SOURCES

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