3 Steps to Deduping Your Own Contacts

There's no avoiding it: your CRM data is loaded with duplicates.

Your people don't always search your Lead, Contact or Account Records before creating new ones. Import tools don't always identify duplicates. Outside systems you integrate with may not check your CRM before generating new records. Sync problems with smartphone apps and email clients can lead to thousands of duplicates. And on it goes.

Whatever the reason, the result's the same. Bad data hurts your marketing efforts and your numbers like nothing else. Your department targets the wrong people, your sales team chases outdated information, time is wasted, and sales are lost.

Numbers don't lie. If this sounds like your company, then you probably have a lot of dupes that need to be cleaned. We understand. Deduping records isn't the best use of your department's time. And it's tedious, if not downright painful.

The good news is that you can repair about 50% of your duplicate records yourself without an enormous time commitment. How? By setting up a repeatable dedupe process you can use any time you want to clean up your records.

In other words, an easy-to-use dedupe checklist—and we'll help you create that checklist right now.

The following three-step process gives you a straightforward sequence to follow every time you want to dedupe. Not having to rethink or re-learn the process makes it simple and repeatable. So no matter how busy you are, whatever else is commanding your attention, you'll have your plan ready to go.

Dedupe Checklist

(Click here for a printable version)

1) Identify what constitutes a duplicate record.

For Leads and Contacts, it's best to require identical or "fuzzy match" (i.e. near-matching) first and last names, plus at least one other matching field in each of the records. Matching email addresses, street addresses, or phone numbers in both records are typically good indicators.

Lead and Contact Records:

- First and Last Names are a match or fuzzy match
- Email is a match
- Street address is a match
- Phone number is a match

For Account Records, it's best to require an identical or fuzzy match company name, plus at least one other matching field - website (if you have it) or street address.

Account Records:

- Company Name is a match or fuzzy match
- Website URL is a match
- Street address is a match

2) Choose which data to keep. Some companies simply choose to keep all the data from the record which was most recently created or modified. Others require more precision and create primacy rules which determine what data will be primary for each data field. For example, “If two different company email addresses, the address with the most recent campaign membership is primary and will be retained.”

How to Create Your Primacy Rules:

- Make a list of data fields that commonly have competing values.
- Consider how long you’re willing to spend on cleaning each dupe. What if your list has more data fields than you can work through in that time? Rank and work through as many fields as you can in order of importance in the allotted time. These will be your primacy rule fields.
- Create a rule for each primacy rule field. How will you decide what to keep for each particular field?

3) Decide what happens to the bad data.

- Do you want to merge the contacts?
- Delete the duplicates?
- Or decide on an individual basis (which will of course take more time)?

That’s it. Set this process up once, and you can use it over and over again. Having go-to rules at the ready makes deduping easy enough that you’ll actually do it, instead of putting it off. The key is to be sure your rules are absolutely clear. You won’t be deduping often enough to be a super-fast wizard - you have a day job, after all! - so you must be able to rely on your rules to guide the dedupe process.

But what about that other 50% of CRM data records that won’t dedupe “easily”? Unfortunately, not all duplicates have matching or fuzzy match information - your software won’t be able to identify those without human review. Or you may need more primacy rule fields than you have time to work through for each record.

Fixing more difficult dupes is why Salesbroom exists. Lots of companies have more bad data than they can handle themselves. Our data stewards are professionals working with the best tools to clean up your data by hand. Clean data means your sales and marketing teams can produce the best results at the lowest cost in the shortest amount of time.

Click here to watch a 5 minute video of our data steward work. Or if you have a data problem that needs attention right away, click here for your free consultation and project estimate.