# Data Cleaning - Best Practices

HUG 18.03.21

HubSpot CERTIFIED PARTNER

**Bee Inbound**

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# OBJECTIVES/AGENDA

1. Clean up contacts
2. Create a uniform nomenclature
3. Delete obsolete or inactive workflows

# Why clean up?

Keeping your CRM data tidy is vital to the success of your business.

Messy and inconsistent database could impose negative effects on your  Sales productivity, marketing initiatives, and customer retention.

In fact, **30% of your database goes bad each year.**

# 1. Clean up contacts - process

Contacts that have **hard bounced**

**First**

Contacts that have listed as **duplicates**

**Second**

Create different **dynamic segments/lists** according to customer engagement

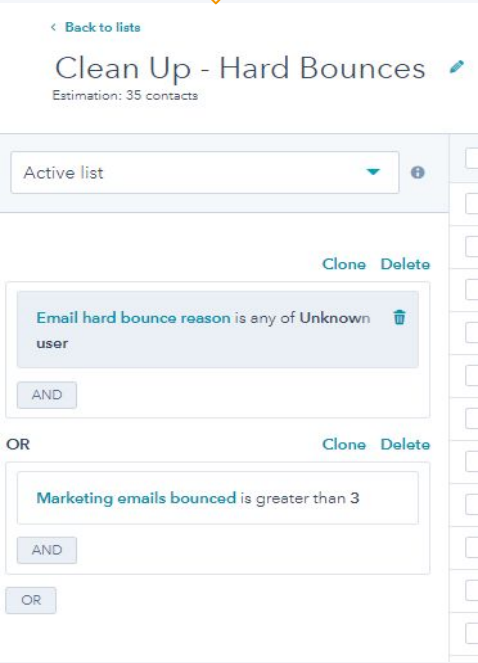
**Last**

# 1. Clean up contacts - hard bounces

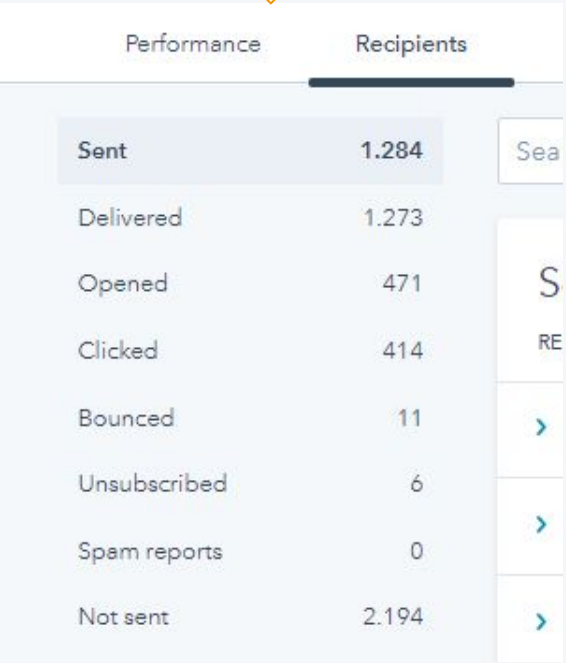
**First**

**HubSpot Bounces Types** **2 approaches:**

1. Keeping a dynamic hard bounce list to clean up




2. Monitor your email on a regular basis



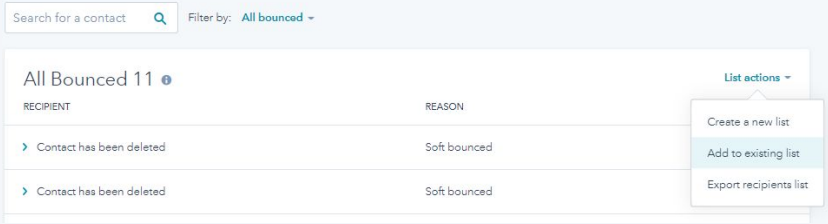
# 1. Clean up contacts - hard bounces

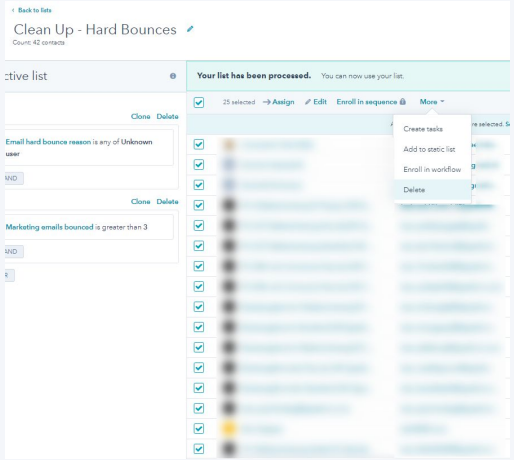
**First**

Clean up by adding to an existing list or delete them in your clean up dynamic list.

You can also create a soft bounce list with your own criteria to try re-engaging some contacts.

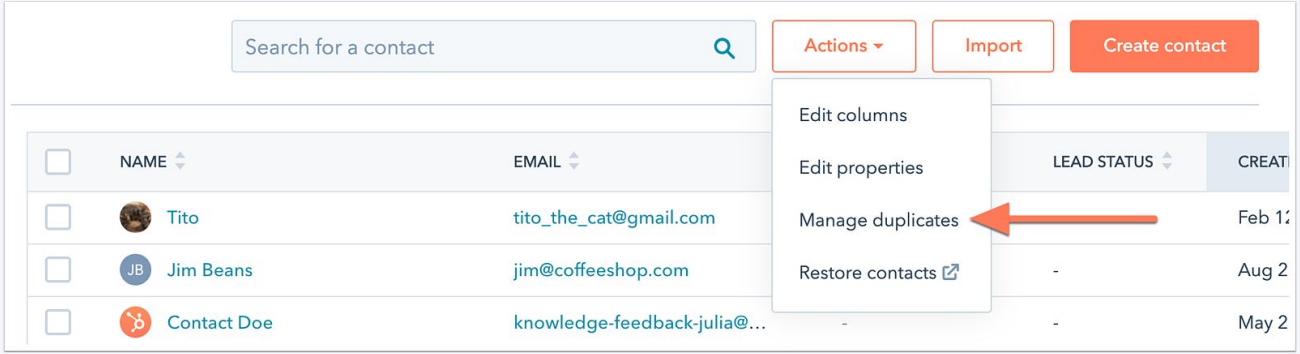
→ Clean up dynamic example



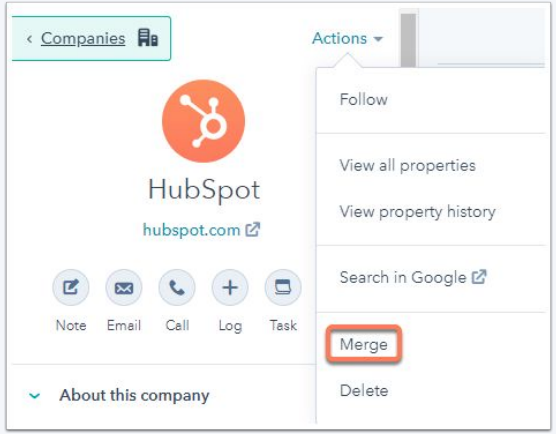



# 1. Clean up contacts and companies - duplicate and merge

**Second**




→ [Duplicate management example]

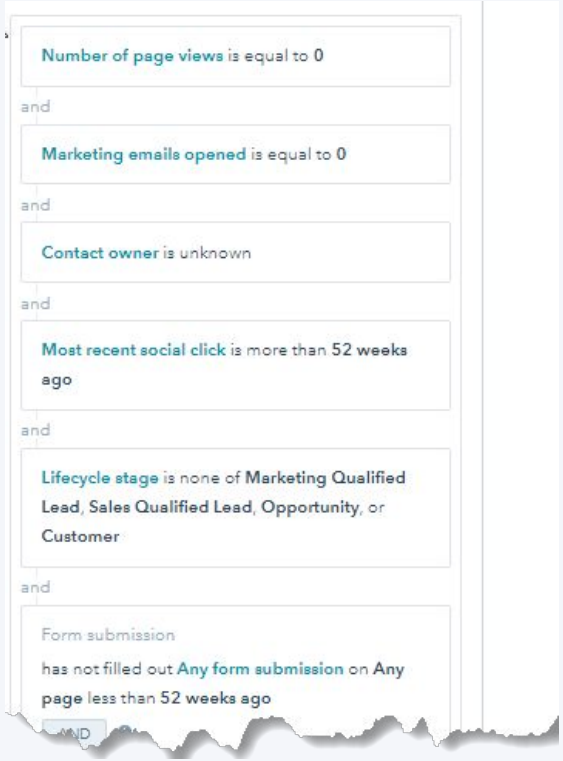


# 1. Clean up contacts - unengaged contact list

**Last**

**Create cleanup contact list**

- User Inactive contacts for 6 months or 1 year




**Fun fact:** All contacts that are not used and bounced should be deleted.
This means that **almost 1.2 k per year** can be saved **for every 1K contacts** in the next pay period

# 1 . Clean up contacts & companies - Field type

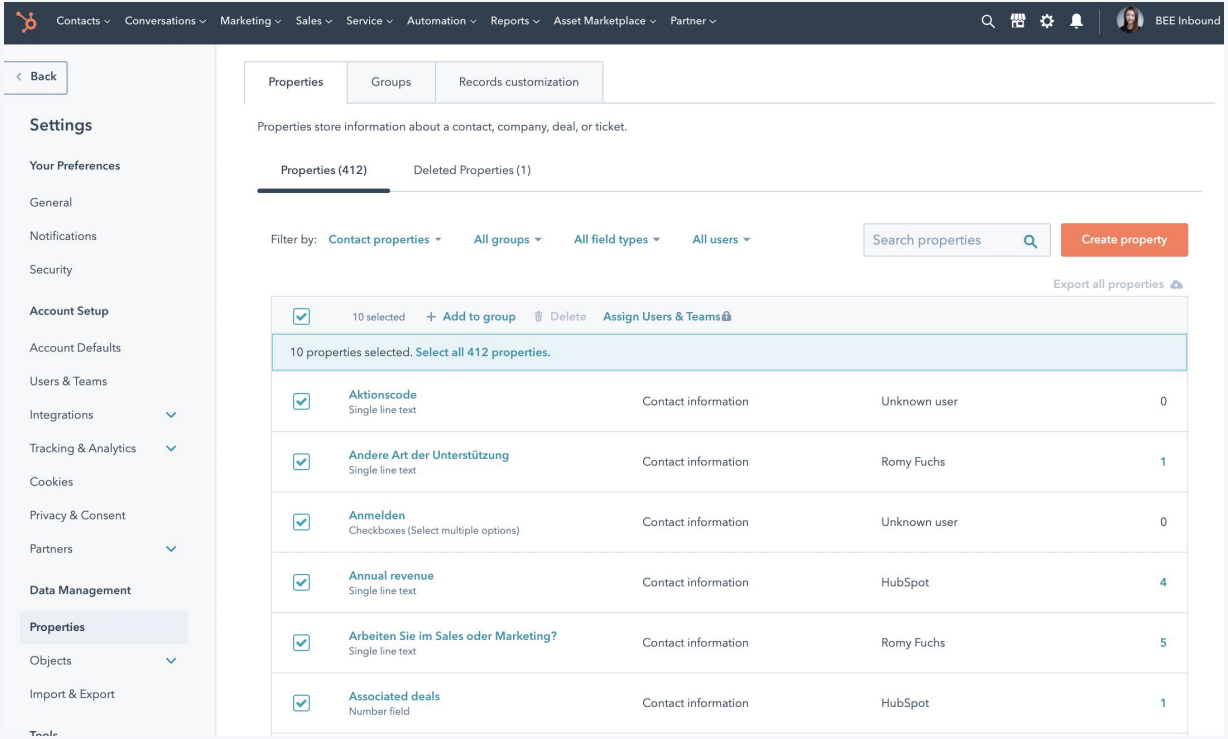
If 30% of your data goes bad every year, you'll waste efficiency in the following topics:

- Duplicates
- Hard bounces
- Inactive users
- Incorrect data
- Inconsistency

And that's only assuming that your properties (attributes) are correctly set!

- Type field
- Validation rules
- Grouping properties together

# 1 . Clean up contacts & companies - Properties




→ Updating and cleaning properties

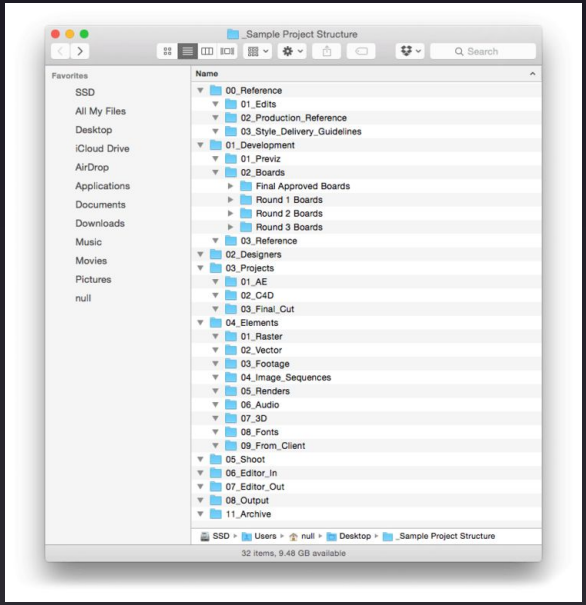
# 1 . Clean up contacts & companies - Field type

Define **correct type fields** is paramount for reporting so think about the type field you need:

- Single Line Text
- Dropdown
- Single checkbox (boolean)
- Multiselect checkboxes
- Radio Button
- Date
- Number

# 2. Create a uniform nomenclature

Keeping your CRM data tidy is vital to the success of your business.



# 2. Create a uniform nomenclature

Have a clear structure of your files and media, that does not only apply to HubSpot but to your business in general

- Structure
- Media files
- Naming conventions
- Adapt the structure to your business needs

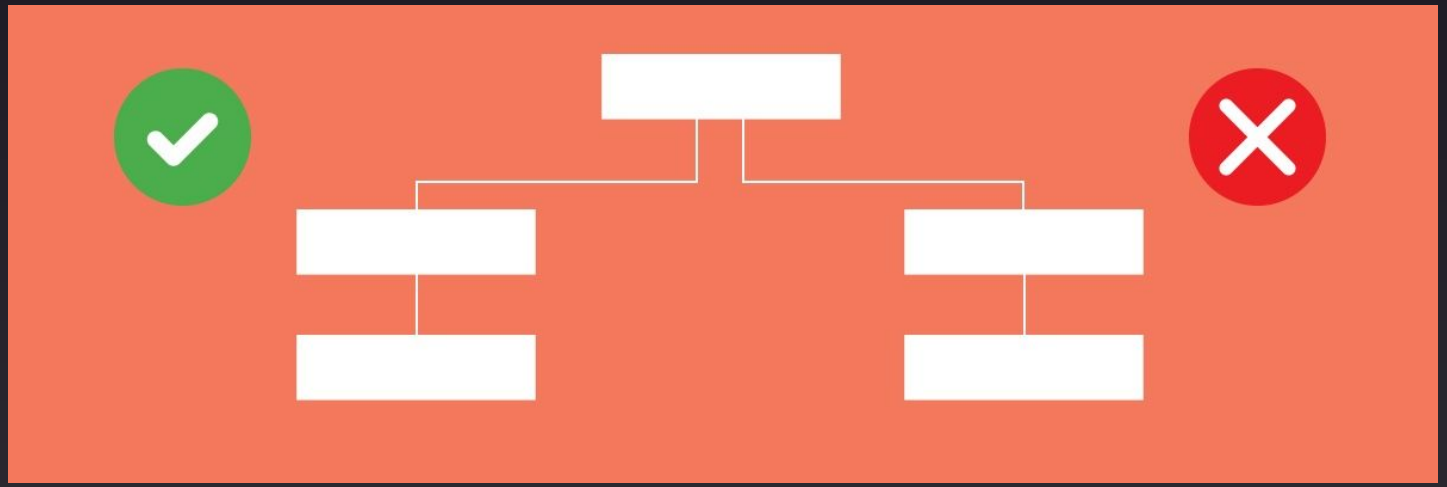
# 2. Naming conventions for files and assets

## HUG DataCleaning - Naming Conventions

| Category | Subcategory | Asset identifier 1 | Asset identifier 2 | Asset identifier 3 | Asset identifier 4 | Asset identifier 5 | RESULT |
|---|---|---|---|---|---|---|---|
| **Marketing Hub** | Website | Type (Website, Landing Page, I | description | buyer persona | | | |
| *Example 1* | | *LP* | | | | | LP \| \| \| \| \| \| \| |
| *Example 2* | | *TYP* | | | | | |
| **Automation** | Workflow | Description | Folder Name / Number | Date YY-MM | | | |
| *Example 1* | | *Lifecycle Stage Classification* | *01_Lead Management* | *21-02* | | | Lifecycle Stage Classification \| 01 |
| *Example 2* | | *Media production company=DLQ* | *03_Lead Nurturing* | *21-02* | | | Media production company=DLC |
| **Conversation** | Templates | Description | Owner | language | | | |
| *Example 1* | | *Follow up meeting* | *LHE* | *EN* | | | Follow up meeting \| LHE \| \| \| \| |
| **Document** | | Client | Type | Topic | language | Agency | |
| *Example 1* | | *Apari* | *Case study* | *Performance Marketing* | DE | BEE | Apari \| Case study \| Performance |

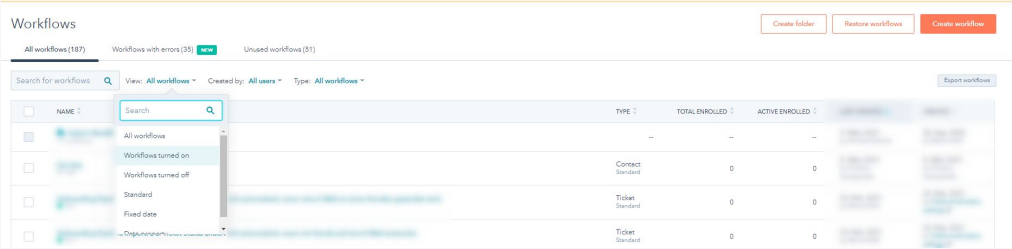
Download

# 3. Delete obsolete or inactive workflows

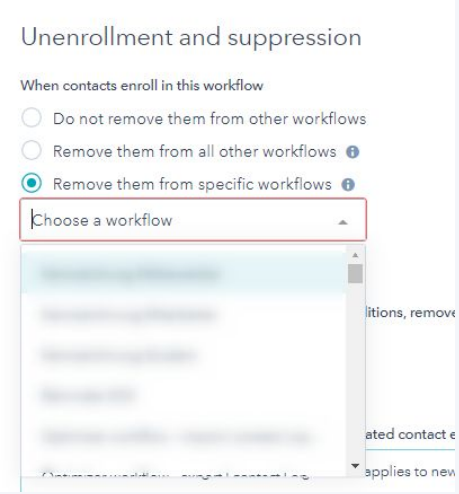


# 3. Workflow structure

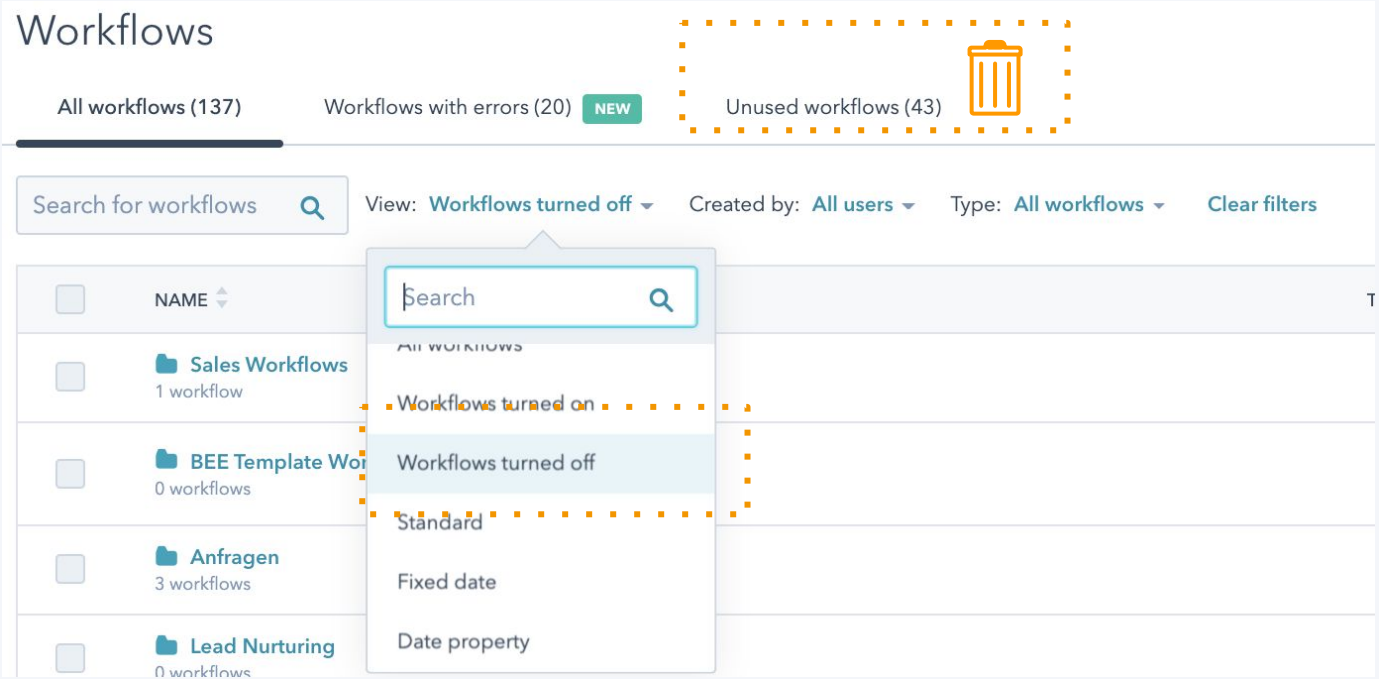
Tip 💡 - try to organise your workflow according to your business needs by creating folders and using naming conventions. Tidying workflows will save you a huge amount of time!




Cleaning workflows will help you keep only important and active ones, you may want to save a few as a template which you would classify under the same folder. It's also better for **performance reasons,** although HubSpot is powerful enough to handle multiple workflows. What's the purpose of having some users involved in workflows which you do not use anymore? You need to pay attention to those **dependencies**, as a workflow might influence another one!



# 3. Inactive workflows




→ Managing workflows

# Summary

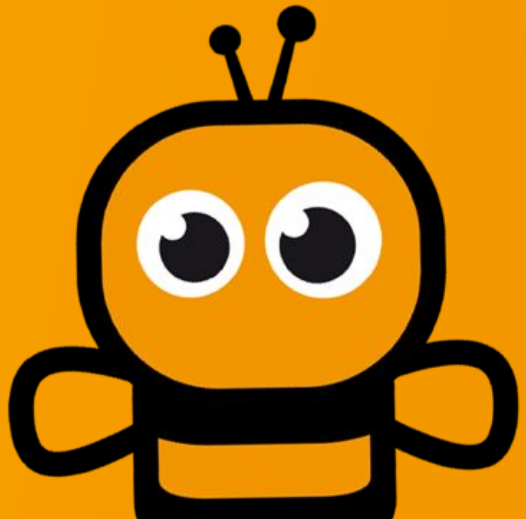
## Avoid 30% of your database going bad

each year

## Saved at least EUR 1.2k per year

100 EUR per month for 1K contacts,

SAVE your cost, in the next pay period

## Save time, increase productivity and accurate reporting

# Thank You