Data Cleaning -Best Practices

HUG 18.03.21





Bee Inbound

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OBJECTIVES/AGENDA





Why clean up?

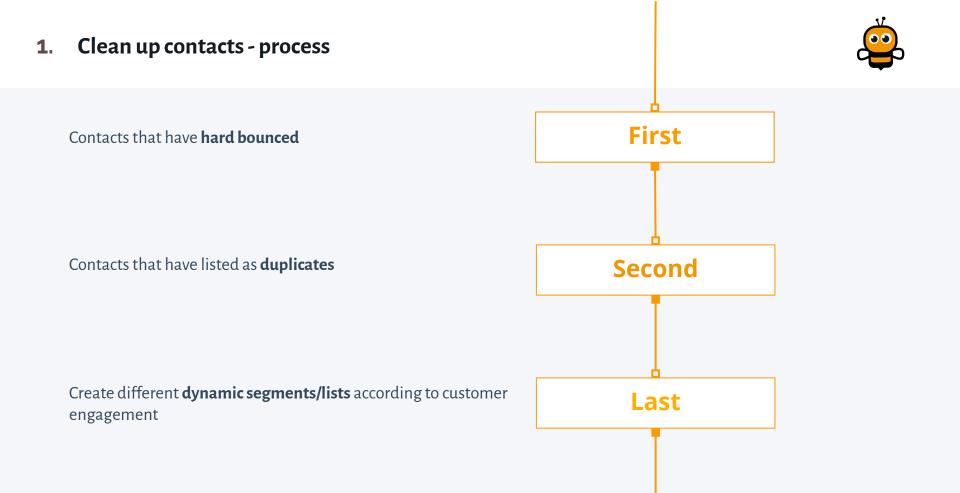


Keeping your CRM data tidy is vital to the success of your business.

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.





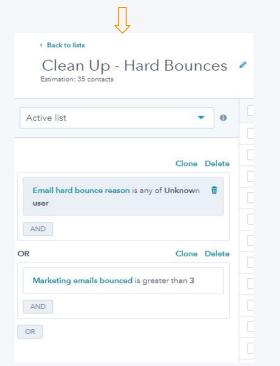
1. Clean up contacts - hard bounces





HubSpot Bounces Types 2 approaches:

1. Keeping a dynamic hard bounce list to clean up



2. Monit	or your email	on a regular b	asis
	Ţ		
	Performance	Recipients	_
S	ənt	1.284	Sea
D	elivered	1.273	
o	pened	471	S
с	licked	414	RE
В	ounced	11	>
U	nsubscribed	6	
SI	pam reports	0	>
N	ot sent	2.194	>

1. Clean up contacts - hard bounces





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.

\rightarrow <u>Clean up dynamic example</u>

-	
	List actions ~
REASON.	Create a new list
Soft bounced	Add to existing list
Soft bounced	Export recipients list
	REASON Soft bounced

Clean Up - Hard Bounces	1			
ctive list e	You	ir list has been processed. You can now use your li	st.	
Clone Delet		25 selected → Assign	More *	
Clone Detet	•		Create tasks	re selected.
Email hard bounce reason is any of Unknown user			Add to static list	ж
			Enroll in workflow	g
ND			Delete	91
Clone Delet	•			1
Marketing emails bounced is greater than 3				
ND				
R				
		-		
		-		

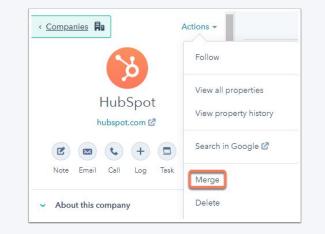
1. Clean up contacts and companies - duplicate and merge





Search for a con-	tact Q	Actions - Impo	Import Create contact		
		Edit columns			
NAME 🔷	EMAIL ≑	Edit properties	LEAD STATUS 🌲	CREAT	
Jito	tito_the_cat@gmail.com	Manage duplicates		Feb 1	
JB Jim Beans	jim@coffeeshop.com	Restore contacts 🗹	-	Aug 2	
🐞 Contact Doe	knowledge-feedback-julia@.			May 2	

→ <u>Duplicate management</u> <u>example</u>



1. Clean up contacts - unengaged contact list





Create cleanup contact list

- User Inactive contacts for 6 months or 1 year

Number of page views is equal to 0	
i -	
Marketing emails opened is equal to 0	
1	
Contact owner is unknown	
1	
Nost recent social click is more than 52 we	əks
1	
ifecycle stage is none of Marketing Qualifi .ead, Sales Qualified Lead, Opportunity, or Customer	
1	
Form submission	
nas not filled out <mark>Any form submission</mark> on A page less than 52 weeks ago	ny
	_



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



🦒 Contacts ∽ Conv	ersations ~	Marketing \sim Sales \sim	Service ~ Automa	tion ∨ Reports ∨ Asset I	1arketplace ∨ Partner ∨	へ 悟 :	🔅 🌲 📔 🗿 BEE Inbound
Back		Properties	Groups	Records customization			
Settings		Properties store	information about a	a contact, company, deal, o	r ticket.		
Your Preferences		Properties	412) Delete	ed Properties (1)			
General							
Notifications		Filter by: Co	ontact properties 👻	All groups 👻 All	field types 👻 All users 👻	Search properties Q	Create property
Security							Export all properties
Account Setup		v	10 selected + A	Add to group 🍵 Delete	Assign Users & Teams		
Account Defaults		10 prope	ties selected. Select	all 412 properties.			
Users & Teams			Aktionscode		Contact information	Unknown user	0
Integrations	~		Single line text		Contact information	Unknown user	0
Tracking & Analytics	~	~	Andere Art der Un Single line text	terstützung	Contact information	Romy Fuchs	1
Cookies			Single line text				
Privacy & Consent			Anmelden Checkboxes (Select m	nultiple options)	Contact information	Unknown user	0
Partners	~		Annual revenue				
Data Management			Single line text		Contact information	HubSpot	4
Properties				les oder Marketing?	Contact information	Romy Fuchs	5
Objects	~		Single line text				
Import & Export		~	Associated deals Number field		Contact information	HubSpot	1

→ <u>Updating and cleaning</u> properties



Define **<u>correct type fields</u>** 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.

$\langle \rangle$	第 🔲 💷 📾 🗸 🌞 🖄 🕤 🗘 💱 🗸 Q. Search
Favorites	Name
SSD	v D0_Reference
All My Files	🔻 🛅 01_Edits
	02_Production_Reference
Desktop	v 03_Style_Delivery_Guidelines
iCloud Drive	v i O1_Development
AirDrop	v ol_Previz
	v 📃 02_Boards
Applications	Final Approved Boards
Documents	Round 1 Boards
Downloads	Round 2 Boards
	Round 3 Boards
Music	v 03_Reference
Movies	v 02_Designers
Pictures	v 03_Projects v 01 AE
	v 01_AE
null	v 03_Final_Cut
	v 04 Elements
	v 01_Raster
	v 02 Vector
	V 03_Footage
	V 04_Image_Sequences
	V 05_Renders
	v 06_Audio
	v 🚺 07_3D
	v 🛅 08_Fonts
	V D9_From_Client
	v 🛅 05_Shoot
	v 🛅 06_Editor_In
	v in 07_Editor_Out
	V 🔜 08_Output
	V 11_Archive
	SSD ▷ IN Users ▷ ☆ null ▷ Im Desktop ▷ Im _Sample Project Structure
	32 items, 9,48 GB available

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



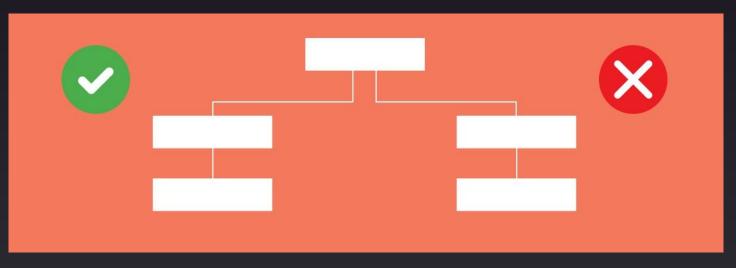
ê, HU	G DataCl	eaning - Nam Asset identifier 1	ing Convent	ions			
Category	Subcategory	Asset identifier 1	Asset identifier 2	Asset identifier 3	Asset identifier 4	Asset identifier 5	RESULT
Marketing Hub	Website	Type (Website, Landing Page,	l description	buyer persona			
Example 1		LP -			-		LP
Example 2		түр 👻			.		
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	Туре	Торіс	language	Agency	
Example 1		Apari	Case study	Performance Marketing	DE	BEE	Apari Case study Performance



3. Delete obsolete or inactive workflows







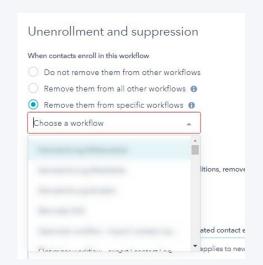
3. Workflow structure



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!

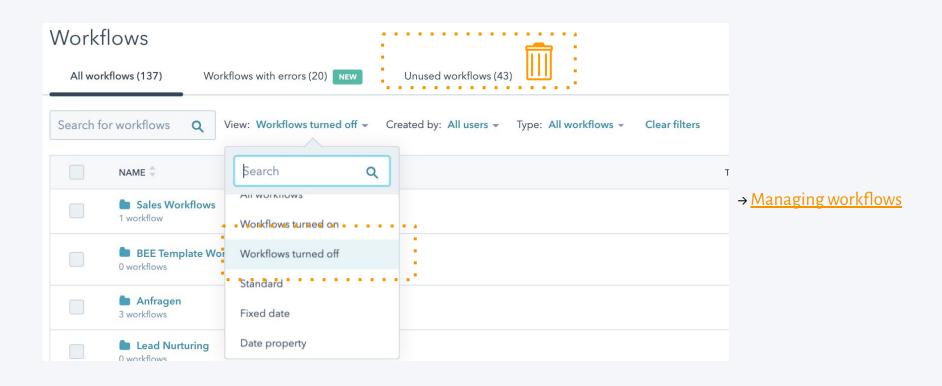
	flows kflows (187)	Workflows with errors (3	35) NEW	Unused workflows (\$1)			Create folder	Restore workflows	Create workflow
Search fo	or workflows	Q View: All workflow	rs * Created	by: All users * Type: All workflows *					Export workflow
	NAME 0	Search	٩		TYPE 🗘	TOTAL ENROLLED	ACTIVE ENROLLED		-
		All workflows			-	-			
		Workflows turned o			Contact Standard	0	0		
	-	Standard Fixed date		constant our sur fill a reaction products	Ticket Standard	ō	0		
	-	Пирилоператичных		and the second second second second	Ticket Standard	0	0		

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









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