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CRM Data Quality & Hygiene Playbook

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35%

Percentage of incomplete
CRM fields in usage

Many data fields remain **unfilled**,
impacting data quality significantly.



100%

Percentage of reps not
logging their meetings
regularly

A considerable number of reps fail to
document their client interactions
properly.

Challenges with CRM Data

Cluttered CRM data leads to inefficiencies, affecting team productivity and decision-making. **Identifying key issues** is crucial to streamline processes and improve overall data quality.

Root Causes

Understanding the **cause and effect** relationship is crucial for addressing CRM data issues. By identifying root causes, teams can develop targeted solutions to improve data quality and reliability.

Best Practices for CRM Hygiene

Streamlining Your CRM Workflow for Success



- Ensure consistent data entry practices
- Implement automated data validation processes
- Schedule regular audits for data accuracy
- Provide ongoing training for all team members

Data Governance



Clear policies

Establishing guidelines ensures **data integrity** and compliance.



Consistent practices

Regular audits maintain **high standards** in data quality.



User engagement

Training sessions improve **data entry accuracy** and usage.

Data Validation



Validation Checklist

Ensures data accuracy through systematic checks.



Automated Entry

Reduces human error by automating data capture.



Quality Report

Highlights discrepancies and suggests data improvements.

Demodesk's Role

Automating CRM data quality for revenue teams

Demodesk has transformed CRM practices, leading to cleaner data and enhanced team productivity through seamless automation.



Metrics



2x higher
conversion rate



+30% more
revenue per seller



25% time saved on
manual tasks