

Database Cleaning: Set Your Organization up for Success

3 MIN READ



The sparkling clean fridge. The immaculately organized closet. The spotless garage.

Spring cleaning is tedious, but leaves you with an endorphin-releasing sense of accomplishment. Spring is also a great time for you to dig into the deep, dark corners of your business and give your database a deep cleanse.

All big database projects are intimidating. But, getting started is always the most difficult step in the process. You should take these 5 steps before you begin the process of database cleaning:

1. Set the team.

Forming a cross-functional committee of key stakeholders – one that includes representatives from IT, ticketing, marketing, fundraising and sales – will ensure that all business functions are considered and championed. Gaining buy-in from everyone during the planning stage will add greatly to the cohesiveness of the team and start you on the right path to project success

2. Set the culture.

This is the perfect time to create (or reinforce) a culture of data literacy within your organization. Explain why it takes a village to grow and maintain a customer database. Stress the importance of everyone in your organization understanding your data, how your system stores it and how to access what you need to better meet the needs of your audience.

3. Set the rules.

Is it *Main St.* or *Main Street*? Do phone numbers include dashes? Do you require customers to use an email address as their username? Take the time to develop (or review) a style guide that will dictate the standard format for all data fields. The key here is that you pick a style and that everyone in your organization sticks to it.

4. Set the process.

Garbage in, garbage out. The quality of your data and how you capture, maintain and store it is critical for all of your core business functions. Your teams – customer service, marketing, fundraising, sales and ticket office operations – are heavily reliant on accurate information that can be viewed and actioned in real-time. The best practice is to have all departments use the same customer relationship management ([CRM](#)) solution to ensure consistency and continuity.

5. Set the schedule.

Rome wasn't built in a day! And let's be honest... your database wasn't sullied overnight either. A complex task like cleansing your database takes time, effort and patience. Setting unrealistic timelines, which will vary from organization to organization, to complete this type of project will just leave you frustrated.

We're here to help!

Our team of CRM and database experts would love to provide you with feedback! Reach out to our marketing team at marketing@audienceview.com and we'll connect you.