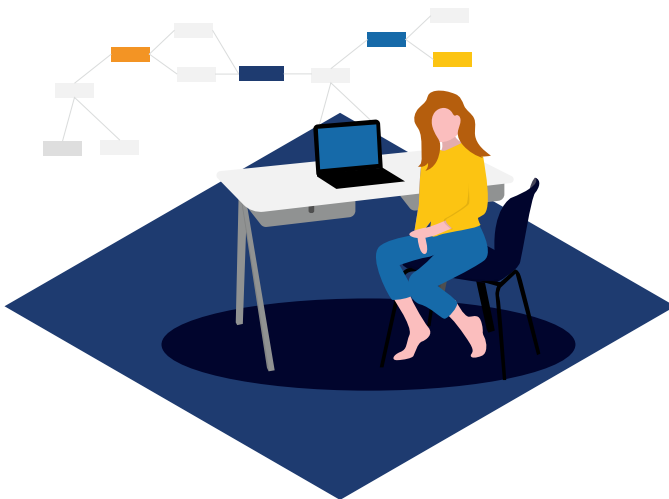


The importance of managing your data

There is a much-quoted statistic that only 20% of CRM implementations succeed (although at **smartimpact**, our customer projects do not have that problem). But why is this stat so low?

In our experience, a key culprit is often the data quality within the CRM. Garbage in, garbage out as they say... If your data isn't up to scratch, it can let down your overall CRM implementation and ongoing user adoption and (via the web site or portal) member adoption.

Want to make sure your data doesn't let your CRM down? Read on...



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The importance of managing your data

The Pareto Principle states that roughly 80% of effects come from 20% of causes and this is as true of CRM systems as it is anything else. Research has suggested that only 20% of CRM implementations are considered successful – and we see a lot of this first-hand when we are called in to provide our *Rescue and Relaunch* service to failing projects. But why is this?

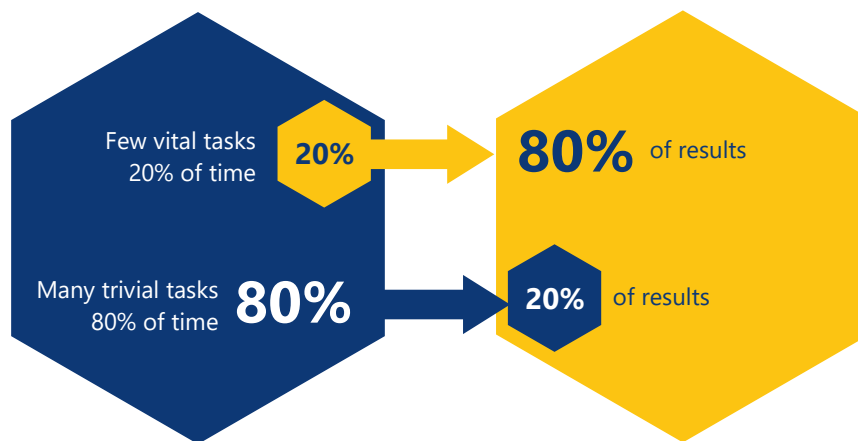


Image: Pareto principle for CRM

Sadly, it is usually down to the often overlooked aspect of data. Both client and provider can spend much time and effort on developing a fantastic CRM system that fits the bill but it fails because there's not been any consideration given to the data eventually added to that system.

Reasons why your data may be letting you down

There are a number of common data issues that may be bringing the overall quality of your data down:

Spelling mistakes – for instance in simple things like in names and addresses. This upsets and alienates customers – and also increases the incidence of duplicate records within your system.

Mismatched prefixes - if you still use salutation prefixes you should make sure they match the gender of the first name. Don't assume a gender either!

Vital data missing – things like postcodes and email addresses are vital for correctly identifying customers and de-duplicating records. You also need these to effectively analyse and segment your data further down the line and provide a relevant experience to your contacts. **smartimpact** has tools that will find and augment this data.

Data in the wrong fields – this often happens when data from more than one system is added to the CRM or when there are multiple users entering data. This will reduce the accuracy of any data segmentation you do. **smartimpact** can set up views to highlight data holes and inconsistency.

Data entered in varying formats – no agreed entry format between users could see many different ways of data being entered into the system, which in turn will affect the accuracy of data segmentation. For example Middlesex could be entered 'Middlesex', 'Middx', or even London as Middlesex isn't technically a county anymore! **smartimpact** can set up data entry masks to filter input, as well as tools that can correct many instances of this type of problem.

Duplicate records - this is both an issue itself and the effect of other issues mentioned above. It can be caused by consolidating data from multiple sources or from things such as spelling mistakes, missing data and data in the wrong fields making records seem different when they are actually the same. **smartimpact** has some very flexible tools that fix this – you can set them and forget them so your data quality is automatically massively enhanced.

Why are these issues a problem?

There are four main reasons you should want to erase the above issues:

1. Damage to your company reputation

One massive benefit of CRM is personalising your message to members, not only in how you address them, but in the content (paragraphs and attachments) you send them. However, we've all received marketing emails that have spelt our name incorrectly, got the wrong name completely, worse still no name at all ('colleague' does not cut it these days with customers) or committed some other personalisation faux pas.

These examples are the simple stuff – in depth personalisation needs in depth data segmentation.

Poor data management is the cause of personalisation issues like this. It will kill your ability to personalise effectively. Your customers and target customers (members or otherwise) are becoming very unforgiving about this and many will simply delete your communication or label you as spam.

Internet service providers (ISPs) can also take a dim view if the problem persists or if enough people label you as spam, and will quite happily blacklist your emails, stopping them from even getting to their intended recipient.

2. Customer annoyance

Irritating and annoying your customers is not a good way to get them to love your organisation, brand, products and services. Just think how Ryanair sales have fared better since they started being nice to their customers.

Manage your members' data with the care and respect it deserves. Show them you understand what they like (and don't like) and that you look after their data like it's your own.

3. The General Data Protection Act (GDPR)

The General Data Protection Act caused a lot of upheaval in the market. The initial concern, and often panic or confusion, that misinformation around this caused has subsided, but of course conformance is still a legal requirement if you store any data on customers (which if you have a CRM system you do).

One of the Data Protection Act's principles is that any data you keep must be accurate and relevant. The Information Commissioner's Office (ICO) is the government body that enforces the Act and, if they have cause to investigate you, they will take a dim view if you have not demonstrably tried to ensure the quality of your data.

At **smartimpact**, our GDPR module helps our customers with this, and also makes reacting to Subject Access Requests (SARs) a straightforward process.

And last but by no means least...

4. Reduction in the effectiveness of your CRM

You've spent a lot of time and effort developing and implementing a gleaming new CRM system, but if the data you put in it isn't good enough, the CRM system won't fulfil its potential and your objectives, as well as disappointing users and members and losing their trust in its accuracy. Too often we see companies blaming the CRM system when it is actually the data that is letting the whole process down.



Tips for improving your data quality

As well as addressing the issues already raised in this whitepaper, here are some of our tips for ensuring a great data strategy:

1. Understand your organisation's data issues

Analyse what your organisation's specific data issues are, and prioritise how to fix them – pick off the data entry issues first and you'll make the most gains as you won't be filling the system with new inaccuracies. We can help you analyse what to do, and quickly fix issues on entry, and for existing data, by batch.

2. Review your data regularly

Whilst you should augment and clean your data prior to uploading it into a new CRM, don't see that data care as a one-off exercise. Put a plan in place to manage this regularly – annually at least, or better on an ongoing basis via automated emails or web forms where relevant (for example, where you have missing data, ask for it on a web form when that member is registering for an event or other information).

Also, consider adding the use of a postcode / address generating and verifying tool to your CRM system as this greatly helps maintain data quality once the new system is in place. We work with all the most effective of these and can advise you on what fits best.

Plus, set up a good on-entry and batch data de-duplicator tool. Dynamics has its own built in, and if that doesn't cover your particular requirements, **smartimpact** can offer a range of additional tools.

3. Appoint a 'data guru'

Ensure there is someone in your organisation with clear responsibility for data – a Data Controller (you should have this as part of your ICO registration, right?). And this shouldn't be a member of the IT department; it should be someone in marketing or management who understands how the data will be used.

4. Have a data entry policy

Implement a data entry policy and communicate it to all staff who need to enter data into any of your connected systems (not just your main CRM). For members who are updating their data online, make sure the data entry screens are masked to reject invalid data input. These steps will ensure that data is entered into the same fields in the same way across all your systems.

5. Data isn't an afterthought

Whether you are implementing a new CRM or integrating existing systems, don't leave your data quality to the end. Incorporate it into the project at the start and dedicate suitable resources into checking, de-duping and consolidating all the forms of data that your system will rely on.

6. Adopt permission-based marketing principles

GDPR has done a good job in moving everyone to operate an 'opt-in' principle with regards to email marketing; this means that all contacts should opt-in (give permission) to you sending them marketing emails and you should provide an 'unsubscribe' option with every email. This also means you should not pre-tick newsletter subscription boxes on any web pages or emails.

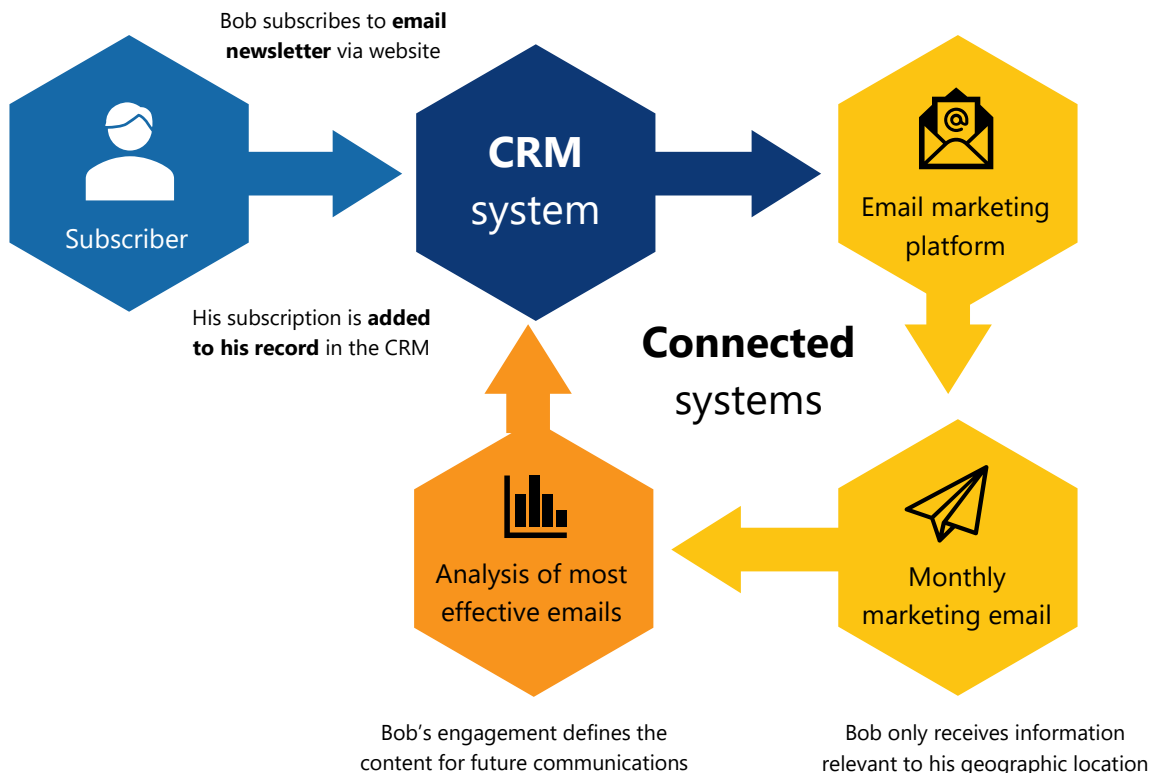
GDPR is a much bigger subject, of course, but **smartimpact's** [smartGDPR](#) app massively reduces the overheads in adherence and subject access requests.

7. Integrate your bulk email service provider with your CRM

You should only have one source of data and that should be your CRM system. This means you should integrate your bulk email service provider with your CRM so you can make sure you are using the latest data when emailing campaigns, and can manage data updates/email preferences back into CRM.

Most email service providers provide API connectors for the leading CRM systems. Some of these APIs work better than others; for instance, Microsoft Dynamics and dotdigital can connect well together, so you can see what emails have been sent to each contact, whether they have opened them, clicked through to a call-to-action, and so on, all from within Dynamics CRM.

Better still, you could replace your bulk emailer with Microsoft Dynamics Marketing so you won't need to worry about any data integration or manual effort at all – and as well as bulk email, you will get social media management and full marketing automation thrown in for free!



We can help...

We are experts in developing CRM systems for membership, charity and regulatory bodies...

We've worked with organisations such as the Solicitor's Regulation Authority, The Royal Town Planning Institute, The Bar Council, The Girls' Day School Trust and the Association of School & College Leaders.

We can help you - so please call us.

We're not big and scary. We work with you to understand your requirements & budget, then create the right solution for you.

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