CRM Education Help Sheets

Preparing Data for Marketing Campaigns

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CRM Education produce help sheets, best practice documentation and bespoke courseware specifically for our clients. We try to ensure our CRM Users always enjoy a straight forward and easy CRM experience.

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Background

Many marketers use CRM systems for marketing campaigns, seasonally such as at Christmas time this functionality is relied on even more so. It is not uncommon for data included in these campaigns to be uncleansed or unqualified and this can result in a large array of problems. It becomes an extremely expensive exercise to start with, and the bounce back results whether through the standard postal system or by electronic mail can cause hours of additional work for marketing departments and CRM administrators. This documentation aims to help CRM users to be aware of the pitfalls of using dirty data, gives an in depth knowledge of how to clean data, and what to look for within data sets to ensure bounce rates are dramatically reduced. We have broken the document into various topics for reference purposes.

Screen design

If you do not have relevant fields in your database holding relevant data then your battle to create marketing campaigns will not be a simple one. It is a good idea from time to time to evaluate your database and look to make the following changes:

Evaluate fields that are not used: If you have unused fields in the database they can overwhelm and confuse users, complicate screens and mask fields that should be populated with important data and above all the screens just look a mess. It is a good idea periodically to locate these fields and hide them. Do not delete them straight away just in case you may need them as Legacy fields but take them out of the layouts and forms.

Build new fields: If you can see an obvious hole in the design and need additional fields then build them and populate them. Make sure that your users are aware of your changes and get them involved with the updates.

Check out drop down listings: Drop down listings can often get over populated either with duplicate values, outdated entries, miss-spellings or invalid entries. Make sure that you tidy them up to make your data more streamline later. If you delete any drop down items or change them, it is important that you globally update any data in the database with the new values as well where possible.

Data segregation

Dicing and slicing data into appropriate and meaningful marketing lists is paramount to any marketing campaign. Some systems use Groups whilst others much though they are in the same vein are known as marketing lists. The main element that these sections of data have is that they are always built on a database query and most commonly use fields in the database to carry out these searches. Hence the need for the screen design tidy in the previous section.

Group to segregate data

Most CRM systems have either a group or marketing list where both dynamic and static groups can be created. Use a dynamic group, which essentially works on a saved query to automatically populate a group or if you have a specific cherry picked target audience, then use a static group. Either way, creation and population of groups ensures that your data is held together for as long as you need it to be. Groups can also be shared with other users or teams, alternatively if you are the one person responsible for a marketing campaign, you can make them private and keep them to yourself.

Global data updates

Using Groups to control data is only the tip of the iceberg. As mentioned earlier in this document, group and advanced find rules always work on field values by design. Searching fields to locate data is typical of all CRM systems, but they all need the data to be accurate to enable the population of relevant groups and mailing lists. Yes you can use contains, does not contain, is empty search criteria as well as other such operators but if the data is not in the fields you are searching then the search rules just will not work. Use global replacement to update missing data, move data in bulk from one field to another and take out invalid data. If you have missing data in any key fields then take the time out to update it.

Find data and clean it

There is no point doing any campaign to dirty data, by post you will get returned mail, by email you will get bounces. Make sure you check postal addresses are correct and current for printed mailings, make sure email addresses are up to date and then segregate the data accordingly.

Invalid email data

There are two aspect to email data. Firstly if you send an

Invalid email address: if you try and send an invalid email address as part of your target data to any e-marketing software it will try and read and validate it before accepting it to a list. Contacts with empty email addresses should automatically get rejected but if your address has a misspelling it may appear valid until it tries to hit a mailbox. It will then reject but obviously will count as part of your send and become chargeable before bouncing.

Generic email address: Some e-marketing systems will reject a generic email address at source – sales@ info@ etc. However some systems take them and this is even more dangerous. Imagine that you have five key contacts all holding a sales@ address in their record card. If just one opts out, then you lose all five, it is so important to search for these generic email addresses and try to get a specific address for the person you wish to mail.

Validate with the record owner

It does not matter how much a marketer slices, dices, cleans and checks if they do not know the history of the record card they are working with, then they may not have enough knowledge at all to check its validity. Imagine a sales manager closes a deal but he does not change the record status to customer and it is still marked prospect. Yes some CRM systems are clever enough to make the change themselves, if something has triggered the change but there is always a trigger and if the cycle of the process is incomplete the data will remain wrong. If your system is not fully automated or a full procedure for promoting a prospect to customer is not in place then you may have a problem. In addition it never hurts to override an automated process with a human eye that knows the data best.

The best person to check and update current working records with opportunities in progress are the people that work with them every day - the account managers. Always ask your account managers to double check your campaign data before you press send, they may be able to validate the data just a little bit more and that can make all the difference.

Summary

You may have read some of these sections and thought but my system is powerful, advanced searches work and some on a fuzzy search so why does this not get a mention. A fuzzy search or where a search engine can look for "like" data or data that "contains" a part value works really well but …. there is no fuzzy search that can find data that is totally out of data or carrying a completely wrong value. These types of searches still only work on data values. Remember if the data is totally wrong, no matter how much of it you have it is invalid and out of date and there is no fuzzy search that can work that out.

We hope that this help sheet is informative enough for you to prepare your data for a Christmas marketing campaign. We do run courses over the Christmas period covering these bespoke topics for the following software: ACT! Sage CRM and Microsoft CRM, for more information on these courses please feel free to contact Clare on clare@oliviaclare.co.uk for more information.