# CRM Data Cleansing,

## *we find people who left at their new company*

CRM data cleansing, done for you. Our team merges duplicates, takes out people who left and bounced emails, fixes formats, validates and verifies each work email, direct dial and mobile number, and fills blank fields. You get a clean file back, ready to import into your CRM.

**Sales teams** | **Marketing teams** | **Sales and revenue operations** | **CRM admins** | **Agencies** | Other teams on request

$499

The 15 price levels start at $499 for 1,000 records.

10

We clean 10 records from your own file at no cost.

1

We reply within 1 business day.

**Clean my 10 free records ↗**

# What is CRM data cleansing?

CRM data cleansing is a service that returns your CRM export as a clean file in your CRM import format. The 8 steps below show the work in order. Our team does every step between your export and your import.

Buyers use other names for the same job: CRM hygiene, CRM data hygiene, CRM cleanup, CRM deduplication, data cleansing services or database cleansing.

**Done for you**
You send your CRM export and get the clean file back. No tool to run.

**People who left, found**
People who left are found at their new company, and the person now in the old job is added.

**Blank fields, filled**
We fill the blank fields in your records from 1,000+ live sources at the time of your order.

**Verified 3x**
Each work email and each phone number is validated one by one.

| | | |
|---|---|---|
| 1 | **Export the file** your CRM export, from any CRM | YOUR SIDE |
| 2 | **Find duplicates** contact and company records | BOOKYOURDATA |
| 3 | **Merge each set** into a single record | BOOKYOURDATA |
| 4 | **Fix the formats** names, phones, countries and job titles | BOOKYOURDATA |
| 5 | **Validate and verify** each work email, direct dial and mobile number | BOOKYOURDATA |
| 6 | **Take out** people who left and bounced emails | BOOKYOURDATA |
| 7 | **Fill blank fields** from 1,000+ live sources | BOOKYOURDATA |
| 8 | **Import the file** your admin loads it into your CRM | YOUR SIDE |

# Duplicate records found and merged into a single record

*01*

### Find the duplicates

We find duplicates among your contact and company records, matched by work email, by name plus company and by phone.

- The same person on 2 records
- The same company under 2 spellings
- The same record imported 2 times

*02*

### Merge each set

2 records become a single record that keeps the details of both. BookYourData changes nothing inside your CRM.

*03*

### Import the clean file

The file names each record to keep or merge into by your own CRM record IDs. Your admin imports it.

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# CRM data cleansing for the CRM you use

**Salesforce data cleansing for your export**
BookYourData cleans your export from Salesforce. The clean file comes back as a Salesforce import file, keyed to your own record IDs, with a status on each record. Your admin loads it.

| | WHAT YOU SEND | WHAT WE CLEAN | WHAT COMES BACK |
|---|---|---|---|
| **HubSpot** | Your file export from the CRM | Duplicates merged, bounced emails out | Your import file back, a status on each record |
| **Zoho** | A file from the CRM's own export | People who left taken out, blank fields filled | An import file keyed to your record IDs, status on every record |
| **Pipedrive** | A file export out of your CRM | Work emails, direct dials and mobile numbers validated and verified | A file in the CRM's import format, each record with its status |
| **Microsoft Dynamics** | The export your CRM gives you | Name, phone, country and job title formats fixed | Your admin loads an import file, each record gets its status |
| **Close** | A file export pulled from your CRM | Bounced emails gone, people who left removed | A clean import file, a status per record |
| **Excel and Google Sheets** | The file you already have | Duplicate sets merged into a single record | Your clean spreadsheet back, every record carries a status |

# People who left their company, and the status of their record

*01*

**Left the company**

Each person who left has a record in the returned file, with a status your admin reads at CRM import.

*02*

**Person’s new company**

The person who left is found at the new company. The new company goes on their record in the file.

*03*

**New person in the old job**

The person now in the old job is added under the same company in the returned file.

# CRM Data Cleansing cleans duplicates, verifies work emails, fills blank fields

## *Data deduplication*

| | |
|---|---|
| INCLUDED | Duplicate contact records, merged into 1 clean contact |
| INCLUDED | Company duplicates, merged into 1 clean company |
| INCLUDED | 3 kinds: same person twice, same company 2 spellings, same record twice |
| INCLUDED | Matches made by work email, name plus company, and phone |
| INCLUDED | The merged record keeps details of both, even where 2 records disagree |
| INCLUDED | Your CRM record IDs name what stays and what merges into it |
| ON REQUEST | Any other duplicate kind you name, merged on request |

## *Formats*

| | |
|---|---|
| INCLUDED | Names in one format, capital letters included |
| INCLUDED | Phone numbers in one format with the country code, for example +1 |
| INCLUDED | Country names in full, USA to United States |
| INCLUDED | Job titles in one format |
| INCLUDED | Typos and spelling mistakes fixed |
| ON REQUEST | On request, split or join fields, full name into first and last |
| ON REQUEST | Any other format fix you name |

# CRM Data Cleansing cleans duplicates, verifies work emails, fills blank fields

## *Email and phone verification*

| | |
|---|---|
| INCLUDED | Every work email verified on its own |
| INCLUDED | Direct dials validated: the person's number, never the company main line |
| INCLUDED | Each mobile number validated and verified with the phone network |
| INCLUDED | Dead numbers taken out of the phone columns |
| INCLUDED | The person verified as still working at the company |
| ON REQUEST | Postal address verification, on request |
| ON REQUEST | Generic addresses like info@ and sales@ are flagged, on request |
| ON REQUEST | Catch-all addresses, throwaway addresses and spam traps are flagged, on request |
| ON REQUEST | Any other email or phone verification the buyer names |

## *Records we remove*

| | |
|---|---|
| INCLUDED | People who left, each record with its status, a rep who moved |
| INCLUDED | Bounced emails, taken out of the file, an address that stopped existing |
| INCLUDED | Test records, flagged in the returned file, example a record named Test |
| INCLUDED | Inactive companies, flagged for your admin, a firm that closed down |
| ON REQUEST | Opt-out and do-not-contact records, taken out on request, an unsubscribe reply |
| INCLUDED | Nothing deleted inside your CRM, remove is a status, your admin decides |
| ON REQUEST | Any other record kind you want out |

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# CRM Data Cleansing cleans duplicates, verifies work emails, fills blank fields

## *Data appending*

| | |
|---|---|
| INCLUDED | Blank fields filled from 1,000+ live sources at the time of ordering |
| INCLUDED | Contact fields: work email, direct dial, mobile number, job title, seniority, LinkedIn URL |
| INCLUDED | Company fields: industry with SIC and NAICS codes, revenue, employee count, website, company address |
| INCLUDED | The person who left, found at their new company |
| INCLUDED | The person now in the old job, added to your file |
| INCLUDED | A company renamed, bought, closed or with a new website, updated |
| ON REQUEST | On request: company hierarchy, parent companies linked to their branches |
| ON REQUEST | Any other field you name |

## *Status*

| | |
|---|---|
| INCLUDED | A status on every record: keep, merge into, remove or replaced |
| INCLUDED | Every new value with the old value beside it |
| INCLUDED | Your admin reviews every merge before loading the file |
| ON REQUEST | A data audit on request, with counts per field before and after |
| ON REQUEST | Any other column you name in the file |

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# What your cleaned CRM file holds

CRM data cleansing returns a clean file. Your records sit inside, keyed to your own CRM record IDs, with the old value beside the new value, and each record gets a status. The preview shows 5 invented records from an old HubSpot export.

CLEAN FILE READY TO IMPORT

| RECORD ID | STATUS | COMPANY | OLD VALUE | NEW VALUE | FULL NAME | WORK EMAIL DIRECT DIAL |
|---|---|---|---|---|---|---|
| 208114 | keep | **Hub Group** | ~~Dir. Carrier Procurement~~ | Director, Carrier Procurement | Elena Marsh | e•••@hubgroup.example +1 630-555-0131 |
| 231907 | merge into | **Hub Group** | ~~231907~~ | 208114 | Elena Marsh | |
| 209552 | replaced | **Option Care Health** | *Bounced work email* | t•••@optioncare.example | Tom Becker | t•••@optioncare.example |
| 214380 | remove | **AdaptHealth** | ~~AdaptHealth~~ | Amedisys | Rachel Ng | r•••@amedisys.example +1 225-555-0174 |
| | New person in the old job | **AdaptHealth** | | | Luis Ortega | l•••@adapthealth.example |
| 220716 | keep | **Watts Water Technologies** | ~~978.555.0142~~ | +1 978-555-0142 | Grace Holloway | g•••@watts.example +1 978-555-0142 |
| 226043 | keep | **Graco** | *Blank field* | +1 612-555-0157 | Owen Patel | o•••@graco.example +1 612-555-0157 |

*Every record you see here is invented.*

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# How we differ from other data providers in CRM data cleansing

| BOOKYOURDATA | OTHER PROVIDERS |
| --- | --- |
| Done for you, from your CRM export | A tool you set up and run yourself |
| People who left are found at their new company | The record is removed, nothing more |
| Blank fields filled from 1,000+ live sources at the time of your order | Filled from a single database |
| Each work email, direct dial and mobile number validated and verified, record by record | A single validation for the whole file |

REQUEST MY 10 FREE RECORDS ↗

# How CRM Data Cleansing works at BookYourData

You send the form. BookYourData replies within 1 business day, asks for your CRM export, cleans 10 of your records for free, then returns the full file keyed to your own CRM record IDs, in your CRM's import format.

*1*

## You send the form

Fill in the form on this page. We reply within 1 business day and ask for your CRM export.

REPLY IN 1 BUSINESS DAY

*2*

## 10 records cleaned free

You send your CRM export. We clean 10 records from your file for free, and the clean records come back within 1 business day of the file arriving.

FREE TEST IN 1 BUSINESS DAY

*3*

## We clean the whole file

The full clean covers your whole file, from the first record to the last. Most files arrive within 3 business days. Bigger files get exact timing in our reply.

MOST FILES IN 3 BUSINESS DAYS

*4*

## Your clean file comes back

The file comes back keyed to your own CRM record IDs, in your CRM's import format. Your admin loads it.

YOUR CRM IMPORT FILE

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# The teams that order CRM Data Cleansing

Sales teams, marketing teams and CRM admins order CRM data cleansing, then import the clean file into their CRM to call, email and report on the records.

### Sales teams

Sales teams call a list where each buyer appears as a single record, because duplicates come back merged. No rep calls the same buyer again.

### Marketing teams

Marketing teams send campaigns to the verified work emails in the clean file, with bounced emails out of the list, and campaign reports show opens and replies.

### Sales and revenue operations

Sales and revenue operations teams run the CRM import, so pipeline counts, forecasts and routing rules work from records with duplicates merged.

### CRM admins

CRM admins load the returned file in the CRM import format, and every record maps to its matching field.

### Founders and small business owners

Founders and small business owners handle the sales calls and the campaigns on their own, and a shared clean file serves both.

### Lead generation and marketing agencies

Lead generation and marketing agencies send client exports through CRM data cleansing before delivery, and the client lists go out with work emails verified.

# The teams that order CRM Data Cleansing

### Account managers and customer success

Account managers and customer success teams keep records current as contacts change jobs, and the renewal call goes to the person now in the job.

### Recruiting firms

Recruiting firms track candidates and hiring companies, and outreach goes to the person still in the role, with the current job title.

### Event organisers

Event organisers clean attendee and speaker lists before the event, so name badges print with names in a fixed format and follow ups go to verified work emails.

### Data and reporting teams

Data and reporting teams build dashboards on the clean import, and record counts match across every panel and report.

### Companies moving to a new CRM

Companies moving to a new CRM import the clean file as the opening load, so duplicates from the old CRM stay out of the new one.

### Other teams with a CRM, on request

BookYourData runs CRM data cleansing for any other group the buyer names, and every order starts with 10 records of the buyer’s own file cleaned free.

# What CRM data cleansing costs, by records

# $499

**The 15 price levels start at $499 for 1,000 records.**

CRM data cleansing is priced by records. Every record in the file you send counts toward your tier, and removed duplicates count too, because each duplicate is one of the records you sent.

## $1,599

The 5,000-record tier costs $1,599 and is the most popular.

## $17,999

The 15 price tiers run from $499 for 1,000 records to $17,999 for 250,000 records.

### You send, we clean

Our team finds the duplicates, removes the bounced emails and fills the blank fields in your file.

### Any field, any fix

You name the field or the fix, and we handle it.

### 1,000+ data sources

Your records are validated against 1,000+ live sources, not against a single database.

### Validated when you order

Validation runs at the time of your order, not before.

**Start with the free test. We clean 10 records from your own file at no cost.**

REQUEST MY 10 FREE RECORDS ↗

# Why one API lookup does not clean your CRM file

One API lookup pulls from a data provider holding hundreds of millions of contacts. A provider of that size cannot keep every data point up to date daily, weekly or monthly. BookYourData starts at the time of your request, with your file, and validates each data point one by one until we find proof.

## *How your clean CRM file reaches you*

Nothing connects to or changes your CRM. BookYourData returns your clean records as a CRM import file, a CSV or Excel batch file, or through your own API endpoint.

**CRM import file**
You get a file in your CRM's import format, keyed to your own CRM record IDs, each record with its status. Your admin loads it.

**CSV or Excel batch file**
Your clean records come back as a CSV or Excel batch file, ready to open, sort and share with your team.

**Custom API endpoint**
BookYourData sets up a custom asynchronous API endpoint for your company on request. Your own secure endpoint returns the clean file when the cleaning finishes.

BookYourData cleans your file once, or on a recurring schedule: quarterly, monthly, weekly or daily.

# Send your CRM export and get 10 free records cleaned

**You fill in the form on bookyourdata.com/crm-data-cleansing and say which CRM you use. BookYourData replies within 1 business day, asks for your CRM export file and then cleans 10 records of that file free.**

*1*

**We reply within 1 business day**

Our reply asks for your export file from any CRM you use.

*2*

**10 records cleaned free**

We clean 10 records of your own file free and you see the results first.

BookYourData uses the CRM file you send only for your order and deletes it 30 days after delivery.

WEBSITE

bookyourdata.com/crm-data-cleansing ↗

Clean 10 free records first ↗