

GTM guide to data quality checklist

Everything to consider when planning a data cleansing initiative

Your B2B go-to-market teams face unprecedented challenges, especially with the velocity and volume of data being acquired through third-party sources and internal applications. Before you can turn the avalanche of data streaming into your RevTech stack into usable insights, you need to clean, standardize, and enrich it.

This comprehensive checklist outlines the important steps you'll need to consider when planning an automated data quality initiative. Review the steps, then go into more detail in each easy-to-reference checklist.

The key capability categories for automated data cleansing are:



Step 1: Pre-launch data quality assessment



Step 2: Data cleansing capabilities checklist



Step 3: Deduplication tasks



Step 4: Additional considerations

Step 1: Pre-launch data quality assessment

Before you embark on any data quality improvement project, establish a baseline for your data quality.

Item	Pre-launch task	Status	Blockers	Who can help resolve/complete?
1	Analysis of data completeness and error rates			
2	Estimate how much data quality can be improved by using your current tech stack, people, and processes vs. an alternative solution or technology			
3	Instrument analytics to track data quality trends over time			
4	Determine metrics/KPIs to analyze data quality improvement based on the assessment			



Step 2: Data cleansing capabilities checklist

Data cleansing is a fundamental step: these are the capabilities you'll need to acquire to complete the work successfully.

Item	Required capability	Yes	No	If no, what additional technology/vendor will have to be added?
1	Automated cleansing of common data fields such as name, company name, job title, email, website, address, and phone number			
2	Flexibility to clean custom data fields such as lead source, territory, campaign, and owner			
3	Support for both continuous and batch data processing			
4	Scalability of configuration and maintenance			
5	A catalog of reference data such as cities, states, countries, postal codes, area codes, internet domain suffixes, free email providers, industry codes			
6	Ability to infer additional data components from existing data components, such as deriving job function and level from job title			
7	Capable of correlating data across different data sources using explicit and fuzzy matching			
8	Include a broad range of data services to add missing data			



Part three: Deduplication

Getting deduplication right is equal parts art and science and requires a good bit of trial and error, which makes documenting your work all the more important. See below for the list of tasks you'll need to complete along the way.

Item	Task	Status	Blockers	Next steps to complete/resolve?
1	Determine which team owns what data and system of record and agree on who will be responsible for what tasks and decisions			
2	Select the system to dedupe against			
3	Document your deduplication logic			
4	Verify your data sync status between your CRM and MAP			
5	Check for data verification rules and other automation that may interfere or be triggered upon deduplication			
6	Determine the surviving records (i.e., which records you keep and which you discard)			
7	Procure a safe, non-production environment or sample records to test, evaluate, and iterate rules			



Step four: Additional considerations

As you finalize your list of requirements for your data quality project, be sure you consider the following factors.

Item	Considerations	Comments
1	Who is the intended user of the new technology? Is it designed for a programmer or a business user? What technical resources do you have access to internally or via agencies to use and maintain the technology?	
2	Is the solution a collection of tools that need to be integrated or is it a single platform? How does that fit your needs and available resources?	
3	What is the projected ROI, including removing other tools and person-hours, for implementing this solution?	
4	What platforms can the solution support or integrate with? Do you have control of and/or access to those?	

Ready to learn more about data quality and how to get started with your own project?

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