DATA HYGIENE AUDIT

# Find and fix the data problems that cause billing errors.

A checklist, issue tracker, and cleanup plan for CRM, contract, and billing data across your systems. Use it to see where your records disagree, log what you find, and fix it in the right order.

## Why data hygiene matters

Bad data rarely announces itself. It shows up as an invoice sent to the wrong contact, a customer billed at last year's price, a renewal nobody saw coming, or a report leadership doesn't trust. Most of it starts the same way: two systems that each hold part of the truth, and no one responsible for keeping them in agreement.

## How to run the audit

**Pull a sample.** Choose 20 to 30 active customers, including a few recent sign-ups and a few with recent changes.

**Check each record** against the checklist, comparing the CRM, the contract, and the billing system side by side.

**Log every issue** in the tracker, including how many records it affects across all customers, not only your sample.

**Follow the cleanup plan** to fix issues in the right order and prevent them from coming back.

PART 01

## CRM and account data

The customer record is where every other team starts.

| | CHECK | PASS | FAIL |
|---|---|---|---|
| 1 | Each customer has one account record, with no duplicates. | ☐ | ☐ |
| 2 | Every active account has a primary contact and a billing contact. | ☐ | ☐ |
| 3 | Account status (active, churned, paused) is accurate. | ☐ | ☐ |
| 4 | Company name, address, and tax details match what appears on invoices. | ☐ | ☐ |

PART 02

## Contract data

What was signed should be easy to find and match what is billed.

| | CHECK | PASS | FAIL |
|---|---|---|---|
| 5 | Every active customer has a signed contract stored in one known location. | ☐ | ☐ |
| 6 | Key terms (price, start date, term length, billing frequency) are recorded in a system, not only in the PDF. | ☐ | ☐ |
| 7 | Non-standard terms and discounts are flagged on the account. | ☐ | ☐ |
| 8 | Renewal and end dates are recorded and visible to Billing. | ☐ | ☐ |

PART 03

## Billing data

The billing system should reflect exactly what the customer agreed to.

| | CHECK | PASS | FAIL |
|---|---|---|---|
| 9 | Every active customer has an active subscription or billing schedule. | ☐ | ☐ |
| 10 | Prices and quantities in billing match the contract. | ☐ | ☐ |
| 11 | Payment terms and invoice delivery details are correct. | ☐ | ☐ |
| 12 | Credits, discounts, and free periods have an end date and an approval on record. | ☐ | ☐ |

PART 04

## Across systems

When systems disagree, invoices go out wrong or not at all.

| | CHECK | PASS | FAIL |
|---|---|---|---|
| 13 | There is a defined source of truth for each type of customer data. | ☐ | ☐ |
| 14 | Customer IDs link records across the CRM, billing, and accounting systems. | ☐ | ☐ |
| 15 | A count of active customers matches across systems. | ☐ | ☐ |
| 16 | Failed syncs or integration errors notify someone who acts on them. | ☐ | ☐ |

## Issue tracker

Log each issue once, with the number of records it affects. Set priority by impact: **High** affects what customers are billed, **Medium** affects reporting or follow-up, and **Low** is cosmetic.

| ISSUE | SYSTEM | RECORDS | OWNER | PRIORITY | DUE | STATUS |
|---|---|---|---|---|---|---|
| *Duplicate accounts* | *CRM* | *~40* | *Sales Ops* | *High* | *Mar 15* | *In progress* |
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# Cleanup plan

STEP 1

## Decide the source of truth

> For each type of data (contacts, contract terms, prices, status), name the one system that wins when records disagree.

> Write it down and share it with every team that edits customer data.

STEP 2

## Fix what affects billing first

> Start with High-priority issues: wrong prices, missing billing contacts, and active customers with no billing schedule.

> Confirm each fix against the signed contract.

STEP 3

## Merge duplicates and fill the gaps

> Merge duplicate accounts, keeping the record linked to billing.

> Fill missing required fields, and make those fields required going forward.

STEP 4

## Reconnect the systems

> Link records across systems with a shared customer ID.

> Make sure failed syncs alert someone who will act on them.

STEP 5

## Prevent it from coming back

> Add the checks you failed to a monthly review, with a named owner.

> Re-run this audit each quarter on a new sample.

## Want help cleaning up your data?

Data cleanup is easier with someone who has done it across multiple systems and knows what to fix first.

### Start with an Operations Assessment

A one-time review of how your customer lifecycle runs today, from sales handoff through collections, including data hygiene and revenue leakage. You get clear findings and prioritized recommendations. For more details, visit www.onestopsourcinggroup.com.

Book a 30-minute call at www.onestopsourcinggroup.com