



# DATA MANAGEMENT:

*Your Guide to Faster Growth  
Through **Cleaner Data***

# Get Better Sales & Marketing Results From Clean, Focused Data

You don't realize it, but your sales and marketing data is pretty dirty. It didn't happen yesterday or last quarter or even last year. It happened little by little, each day, and it has accumulated over time. Now, since you've rarely (or never) cleaned your data, its uncleanness is putting a drag on sales and marketing performance, and slowing your company's growth.

Add to that the changing nature of your business. Initiatives come and go, markets are entered and exited, strategies ebb and flow. Over the past few years, data was added to support your business needs, but older data was rarely deleted as those needs changed. *Do you really still need to keep leads generated at that fax machine industry event back in 2009?*

Two factors conspire to turn your valuable sales and marketing data into a liability:

- 1 As your business grows and shifts, your data requirements change.
- 2 As time goes by, data naturally decays.

SiriusDecisions found that  
**25%** of the average  
**B2B DATABASE IS INACCURATE**  
at any given time.

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### PRO TIP:

As you focus on generating more qualified leads and engaging with more customers, the answer isn't more data. **The fastest way to increase your pipeline and grow your business is by cleaning and focusing your data.**

## Data Needs Change With Business Strategy

Most businesses change as they grow. You enter new markets, expand your offerings, and target new customers. Similarly, you pull out of other markets, drop underperforming products, and stop targeting weak segments. It is the natural progression of business.

But during those shifts in business focus, few companies mimic those changes in their data, especially when they don't delete data. Conventional wisdom says that email is free, so blast away and hope for that bluebird lurking in the pile. But even emails have a cost, both in maintaining data within your marketing automation and CRM systems and in decreasing marketing performance.

**Too much unnecessary data hurts your deliverability, open and bounce rates, and can label you a spammer.**

What you need is better data. Data that matches your current customer personas and profiles. Data that is focused only on those you are targeting, but also data that completely covers those you are targeting.

### Your data was already dirty.

Data is a river that is constantly changing. The Bureau of Labor Statistics say that over 2.7 million people quit their jobs each month.

Companies relocate, expand, have layoffs, change names, and more. And the changes are constant. Whatever your sales and marketing data says today, a portion will be inaccurate tomorrow.

**These changes translate into company and contact data decaying at the rate of two to five percent per month for typical B2B companies, according to several studies from MarketingProfs, Biznology, and others.**

### If you've done any of these things in the past year, a portion of your data is suspect:

- Added new or retired products or product lines.
- Added purchased lists, contacts from third-party feeds or syndications, or imported data from other sources.
- Experienced a drop in lead quality or an increase in sales feedback concerning poor quality leads.
- Entered new markets or new regions or exited from ones you previously targeted.
- Altered your marketing message or your go-to-market plans.

Step 1:

## Set Goals and Get Started

Make your data-cleaning efforts a legitimate project — with an owner and a champion, and with executive support from both sales and marketing. It is important to avoid finger-pointing and discussions over who “owned” different data or systems.

**This must be a joint project, and the intent is to improve, not blame.**

First, set goals for your data and determine what you really expect from it. Are you attacking new markets, wanting to increase conversion rates, looking to support company growth, or something else?

## What do you want from your data?

Dirty and bloated data hurts productivity and impacts everything. Marketing wastes time targeting and attempting to engage with unsuitable, old, or incorrect prospects. If unsuitable prospects turn into sales leads, sales wastes time trying to connect with leads who aren't interested.

Also, consider the various marketing and sales technologies that have been added to your tech stack over the years. Some applications were useful, some were pet projects of people long gone, and others were implemented or used by people you won't even remember.

**Many will have one thing in common, however: They all cost money, both in budget and resources. You need to cut and to be ruthless in your decisions.**

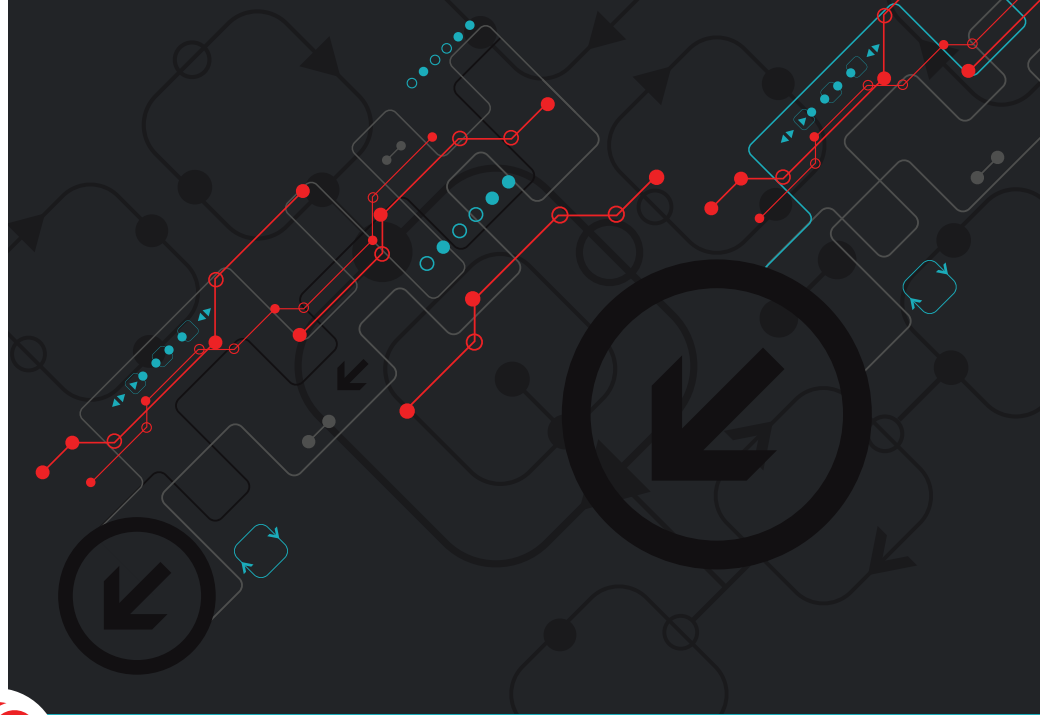


## Behind the Curtain — Here's What We Did:

A few years ago, InsideView's CMO and VP of Sales got working on two initiatives: better alignment of their teams and moving to account-based sales and marketing strategies (ABM).

As part of these efforts, the two teams were collaborating on more projects, communicating more often, and, unfortunately, encountering dirty data more frequently. They started asking these questions:

- *When was the last time we cleaned our sales and marketing data?*
- *How does marketing automation data flow to our CRM system, and which fields are transferred?*
- *Are these alignment and ABM initiatives shifting our customer targets and go-to-market plans?*
- *Where is all this data being generated and where does it reside?*
- *How do all of the marketing technology applications work together? And do we need them all?*



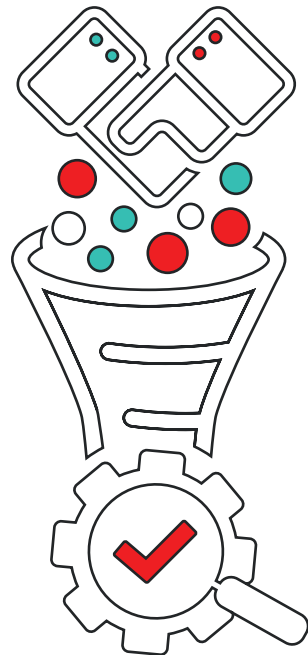
Step 2:

## Map Your Data and Apps

Map out all of the data fields collected across the customer lifecycle so you know what is being captured, where it comes from, and how or if it is being shared across systems. Doing this takes insight into the different systems and how they are integrated, so be sure to pull in the most knowledgeable resources.

**Don't get bogged down in "mine" and "yours" when it comes to this step. It's not important. What is important is to determine what marketing and sales need to do their jobs.**

Once you know what data is being generated, where it's coming from, and how it's being stored, work together to create "keep or purge" criteria at the contact record level. Surprisingly, this is where you can quickly purge a good chunk of data that is of no use. For example, why keep a Best Buy merchandising manager in your system if you are not targeting the retail industry? It costs money to maintain those records, yet they are not relevant to your business.



### Behind the Curtain — Here's What We Did:

During our last data cleanse, we created the following keep/purge criteria for contact records:

#### KEEP

- active leads
- current opportunities
- activity within past 12 months
- active customers

#### PURGE

- no or bad email address
- no or bad phone number
- no activity in past 12 months
- unsubscribed

These criteria were not just arbitrary and, in fact, took much discussion to create. They were based on our business, our target market, and our target personas.

For example, given the pace of job change in our target personas, sales had found that leads without activity for more than a year had either moved on to other companies, focused on other projects, or chosen a different solution. It wasn't that we were writing off the account, just that we were confident the person was no longer a quality lead.

Define your keep/purge criteria by reflecting on your goals and your business needs:

- 1 Keep all active leads, contacts involved in current opportunities, and customers.
- 2 Set an acceptable age for contacts and purge those that are older.
- 3 Purge contacts who have had no activity for a long period of time.
- 4 Purge those who have unsubscribed (but be sure to store them in an unsubscribe list).



**Remember, your specific criteria will change based on your business, target markets and target personas. Be sure to revisit your criteria on a regular basis to account for these expected changes.**

**PRO TIP:**

**Before you do anything, back up and save your entire database.** The importance of this step cannot be overstated. Data is, after all, the lifeblood of business. Be confident in your keep/purge decisions, but it's always good practice to have a backup.

Step 3:

## Convert Doubters by Quantifying Your Data's Cleanliness

The idea of deleting a chunk of your sales and marketing data, even with a backup, isn't an easy sell to an executive team. More data is better, right? What if we eventually want to target people we are not targeting now? These are all good questions, so quantifying your overall data cleanliness is the best way to support your decisions.

**To keep it simple, analyze your data across different points and share your findings.**

Articulate the state of your data by quantifying the number of contacts that:

- 1 Are missing both an email address and phone number
- 2 Have a bad email address
- 3 Are more than 2.5 years old
- 4 Are more than 5 years old



You can further segment records on your “purge” list based on their origin to uncover other challenges or further tighten your criteria. Knowing that certain campaigns or channels drive great, seemingly qualified leads — but ones who eventually end up on your purge list — can open eyes and change perceptions.



### Behind the Curtain — Here's What We Did:

In our most recent cleanse, we looked at our purge list to discover who they were and where they came from. We wanted to know why we were attracting leads we decided to ignore.

We were surprised to discover that a large percentage of leads who filled out a web form on our own website were to be purged. People who found us and were interested enough to give us their contact information weren't viable leads, but why?

What shocked us even more was that some of our sacred marketing truisms were flipped upside down. When we compared leads sourced from our own website versus those from seemingly less-qualified sources such as purchased lists and events, *ours were worse!* Those other “weaker” sources had nearly a **10 percent advantage in leads kept over those from our own website.**

Digging deeper, we found we weren't purposely attracting bad leads, but we were casting a too wide of a net. Our cleansing project helped tighten our criteria and better match our business goals.

Step 4:

## Start Cleaning

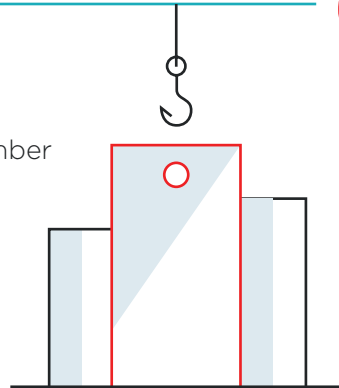
Hold on there, champ. Don't hit the delete button quite yet. Your cleaning process should be methodical, so start by building a plan. Also, you should expect it to take at least a few weeks. Many marketing automation systems limit the number of records processed per hour to a couple of thousand or less. If you're purging even just 100,000 records, that could take a full day.

### Once again, back up your data before you do anything.

Specify your criteria for which records are to be purged. You did this in the previous steps, but now is the time to build the workflow to actually do the purging. Write it down, get agreement, and then begin the process. Also, think about it in terms of software logic. It may look something like this:

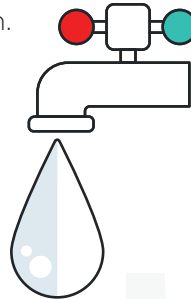
#### PURGE IF:

- No activity for > 1 year
- Invalid or no email address / phone number
- Email and phone fields are blank
- Unsubscribed = Yes
- Contact creation date > 3 years



#### KEEP IF:

- Recent sales or marketing activity
- Associated with an opportunity
- Existing or previous customer



### Behind the Curtain — Here's What We Did:

Prior to our latest cleanse, we were maintaining a database of just over 1.1 million records. But over the past few quarters, we had released several new products, adjusted our messaging, moved to an account-based marketing strategy, and refocused our target personas.

Those changes, even though some were slight, showed that about half of our database was no longer relevant to our current go-to-market strategy. It meant that we were getting ready to purge several hundred thousand leads.

We designed our purge to work **only overnight**, so as not to impact any live campaigns during the day. It took nearly **two weeks to totally complete our purge**, but we exited the process with a slim, nimble, and much cleaner database.

#### Step 4: Start Cleaning, Cont'd

Next, schedule the purge. Expect it to take anywhere from a few hours to a few weeks, depending on how much flexibility your CRM or marketing systems allow you in scheduling the purge.

**Some systems will only let you run the purge in off-peak hours or will limit the number of records you can process per hour.**

Also, be sure that records you're deleting from one system are also being deleted from others. Sales operations or IT should be able to help so that, for example, you don't delete a record from your CRM system only to have your marketing automation system re-sync that old record back into existence.



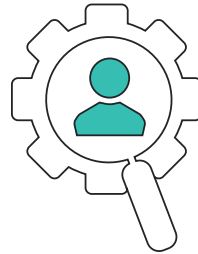
#### PRO TIP:

Contact your CRM and marketing automation vendors to determine if the reduction in records also impacts your monthly fees. **Many vendors charge by the record, so a large purge could reduce your costs.**

Step 5:

## Constantly Improve

Now that your data has been slimmed down to just what's relevant and important, your work is just beginning. You don't want to go through a big purging process every year, so a constant focus on maintaining your data's cleanliness and increasing its value is important.



### Enrich current and new data.

For the data you retained, you may still have empty fields. A targeted title with valid contact data is great, but knowing its industry and employee count makes it even more targetable.

You'll also be adding new contacts to your database every day. When you do, don't give them a dozen fields to fill out on a webform; we all know that hurts conversion rates.

**Instead, use a service to enrich their record in real time with the data you require. You'll increase form conversion rates and get more targetable leads.**

### Refresh data with ongoing updates.

Contacts get promoted, change titles, or leave companies, leading to inaccuracies. People register twice or are entered by two different sales reps, creating duplicate records. It all leads to wasted time for both marketing and sales.

Whatever the cause, your data can quickly become dirty if you don't stay diligent.

**A good and ongoing cleaning plan must include a data refresh at least annually, but a quarterly refresh is even better.**



## Behind the Curtain — Here's What We Did:

We were confident that cleaning our data would lead to better results all around. But, as with everything, we wanted to quickly quantify the improvements and see how well the cleanse contributed to better performance.

Not only did we see a significant uptick in our deliverability rates, we saw the following substantial improvements:

**24%**

**BETTER OPEN RATES**

**156%**

**BETTER CLICK-TO-OPEN RATES**

Because we purged the leads that no longer fit our ideal targets, we were no longer trying to engage contacts with a message that didn't resonate. By tightening our list, we could also tighten our messaging and better connect with our targets' needs.

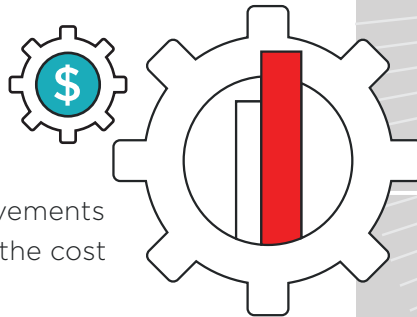
## Step 5: Constantly Improve, Cont'd

### Evaluate your coverage.

As your data ebbs and flows, or as you move into and out of markets, your target coverage will change. That impacts your ability to support your go-to-market plan.

**It's important to keep an eye on two things: coverage of named accounts and coverage of overall markets.**

For named accounts, look at which accounts have no or little representation in your data. Then, start targeting those accounts or looking for ways to improve your coverage. For overall market coverage, do some research to gauge the size of the markets, then compare that to your data. Again, work to target those markets or improve your coverage.



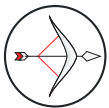
### Quantify your improvements.

Make your leadership team aware of the improvements in coverage and market penetration, as well as the cost reductions from a slimmer database.

At least quarterly, communicate a few data-driven metrics to help everyone understand the benefits of a cleaner database:



Cost reductions in CRM, marketing automation, and other software and storage solutions.



Improvements in email deliverability rates, open rates, and unsubscribes.



Increased sales effectiveness, such as saved time, reduction in dead-end leads, and increase in number of deal opportunities created.



Percent market coverage and named account coverage.

## Don't Delay

We're all busy driving leads, engaging with prospects, and shifting strategies. That's never going to change. But as you continue to delay a data cleanse, you're just adding to your workload by chasing leads that are not worth chasing.

More data is not better. A lead that has been inactive for two years isn't going to close. A thousand records with invalid emails aren't improving your marketing metrics. But taking a moment to really look at your data, to quantify the inaccuracies or coverage gaps, will open your eyes. It can also lead to higher productivity, lower costs, and faster growth.

**Even if you have only a few minutes, answer these questions. You might just be shocked into action!**

### ASK YOURSELF THIS...

*When was the last time you cleaned your data?*

*How old is the oldest record in your data?*

*How long have you been using your current marketing automation tool?*

*How do you sync data between your sales and marketing tools?*

### BECAUSE OF THIS...

➤ Data decays at a rate of five percent per month, so if you haven't cleansed in a year, it's time. If it's been two or more years, you're in trouble!

➤ Think about how much has changed since then — marketing channels, the overall market, employment, company firmographics — and determine if all of your data is still relevant to your goals.

➤ If it's recent, you might have gone through a cleansing process. If your system is old, the clutter builds up over time.

➤ Maybe they all use the same data, and that's great. If not, map it out, consider consolidating, and cleanse it while you're consolidating.

To learn more about data management, sales & marketing alignment, or Insideview, visit [www.insideview.com/resources](http://www.insideview.com/resources)

#### About InsideView

InsideView helps businesses drive rapid revenue growth by empowering business leaders to discover new markets, target and engage the right buyers, and manage customer data quality. Our AI-based enterprise B2B data platform delivers the industry's most relevant and reliable buyer signals and, combined with InsideView's data expertise and best-in-class customer support, is trusted by the world's best performing companies.

