GUIDE

9 CRM BEST PRACTICES FOR **BETTER HUBSPOT PERFORMANCE**

Cleaning Your HubSpot CRM Data To Improve ROI For Better Communictions Marketing

vonazon

Collecting relevant contact information is essential when developing your marketing and sales strategies. But without routine maintenance, client data will decay and clutter your CRM database with outdated information. When this happens, productivity drops because contacts must be communicated with manually or risk your HubSpot account becoming suspended.

Data hygiene-based CRM best practices take work, but they're worth the extra effort for boosting your ROI and marketing communications. We've created a simple CRM best practices how-to guide to help you streamline these processes and get the best performance out of your HubSpot CRM.

What is CRM Data Hygiene?

Data hygiene maintenance consists of companies reviewing their database, ensuring that only high-quality data remains. Good data is anything current and accurate. In comparison, bad data includes outdated contacts or conflicting information (multiple phone numbers for one data point). CRM best practices like maintaining good data hygiene will keep your marketing communications relevant, precise, and consistent.

9 CRM BEST PRACTICES FOR DATA HYGIENE

1 Lower Your Bounce Rates

Reducing bounce rates is key to protecting your brand reputation during the HubSpot data cleansing process. There are two rates you need to know: hard and soft bounces. A hard bounce happens when a permanent issue, like an invalid email address, prevents an email from being sent. A soft bounce occurs when a temporary issue, such as a full inbox, blocks your email. Data cleaners such as ZeroBounce offer advanced data hygiene tools like A.I. scoring, email list enhancement, and improved content readability that can reduce bounce rates.

2 Maintain an Opt-Out List

One of the most valuable data hygiene best practices is to offer a chance to walk away. Using your resources to focus on interested customers is better for qualified lead generation, as it connects you with the right audience. Brand messaging can even be strengthened by people opting out because it gives you the chance to gather feedback on why they were disinterested or encourage them to come back by letting them know they are valued.
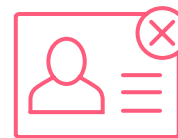
3 Consolidate and Standardize Data

To make your data hygiene more consistent, standardize your HubSpot data cleansing process. Vonazon recommends setting property fields that generate automatically when manually entering your CRM data for contacts or companies—giving your sales team context for personalized messaging. Once you have that relevant data, create standards for inputting data into your system. Which fields are essential to your customers, what apps to use for data input, and how to catch grammar errors that will hurt search rates? Each will ensure access to only the most relevant and uniform data possible.

4 Remove Whitespace and Unwanted Characters

By removing extra white space in your fields, you'll make contacts easier to search for online. If you want excellent data hygiene on HubSpot, you need to reduce unwanted and rogue characters as much as possible. Both are commonplace issues that can severally damage your brand reputation due to compatibility errors that spin out into higher bounce rates.

5 Manually Delete Bad Contacts

Over time contacts begin to decay in your database, often due to people changing their contact information. There is no point in marketing to someone who hasn't or isn't reading your emails, so remove clutter from your CRM by manually deleting these contacts.

6 Merge or Remove Duplicate Records

During your HubSpot data cleansing process, identify and delete duplicate contacts. HubSpot has an AI learning management tool that will sort out duplicates based on contacts, companies, and properties to help you clean your space.

7 Remove Bounced or Unsubscribed Contacts

HubSpot's hard bounce limit is 5%, but you should aim for a rate of less than 2%. To make this possible, create a list of outdated contacts then delete them from the database in one bulk task.

8 Delete Unengaged HubSpot Contacts

You can filter out unengaged contacts using the date they've recently interacted with your email marketing. Then sort contacts with the lowest engagement into a list based on their bounce or spam rates, and finally purge them.

9 Clean Up Your Old and Unused Lists

Data you can't use serves no purpose; worse yet, it costs you money. Periodically update your old contact lists and consider whether the unused ones are worth keeping. Deleting these lists keeps sales and marketing consistent by only using relevant information.

YOUR **NEW HUBSPOT** HYGIENE PLAN

Determine Who Will Clean The CRM

Staying organized is key to maintaining healthy data hygiene in HubSpot. But only some companies have a dedicated CRM data manager. Consider making this a team effort by teaching each department to check their data and work checks and balances into your workflows.

Standardize Your HubSpot CRM Data Input

Build a plan for how and when your teams should input CRM data. Create consistent results using data fields that trigger automatically with manual CRM inputs on HubSpot. If you have "Professional" or "Enterprise" mailing lists, make specific fields mandatory to search to find quality leads for sales.

Review Data on A Regular Schedule

No one is perfect, but you can make the dream work with the right teamwork. Making sure your team stays on a schedule allows you to control what data flows through your CRM. The end goal should be that all team data matches and is accurate enough to solve client issues.

Establish a Regular CRM Cleaning Schedule

Taking charge of your success means staying consistent wherever you can. Invest time into creating a work schedule for when the data cleaning should occur. Every week? Every year? Outside factors will affect this, but having a time set in stone encourages higher quaility and more accurate data.

Utilize HubSpot's Integrations For Assistance

Data integration tools are a massive advantage in fully automating your HubSpot data cleansing process. Insycle Data Management can increase data standardization and merge duplicate records. Leadspace quickly matches you with accurate data using lead routing. Property Capitalize reduces your search error with instant grammar correcting.

GET A FREE EVALUATION NOW

LET'S WORK TOGETHER

The nature of working in marketing is that there is a half-life to every piece of digital information. After enough time has passed, even the most reliable leads decay down into bad contacts, unengaged leads, outdated emails, and other clutter that breeds inconsistent results on HubSpot. The ability to grow and expand your business comes to a grinding halt when you lose sight of customers with bad data.

As a CRM tool, HubSpot comes with built-in features that allow for the level of maintenance that a proper data hygiene plan needs to succeed. These CRM best practices will help you get into the mindset of reviewing your data and eliminating messy information you can't use. Without a constant flow of accurate data, ROI won't increase, and your business won't be able to evolve, hurting your potential to grow.

Contact our sales team to learn more about HubSpot with a free demo.

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