

Data Clean-Up Checklist

Clean standardized data can help your migration go smoothly, may help you save money, and can help you to hit the ground running with your new system. Every organization may have different criteria when preparing for a transition, but read below for some ideas about how to ensure that your data is relevant.

De-duplicate Records or Eliminating Duplicate Entries

Merge duplicate records into one master contact.

Remove Old Data

Eliminate inactive records and save them locally. For example, you might want to remove a record that hasn't had any activity in five years, or everyone who has a bad email address and phone number. However, each organization has different criteria for what is considered old data.

Append Incomplete Data and Update Data

Run necessary appending services like National Change of Address, append email, append phone number, update political districts, or social network information.

Combine Files

Combining multiple spreadsheets into one sheet makes for an easier (and often time less expensive) data migration.

Standardize Headings

Standardize headings on your spreadsheets to reflect field data.

