

FREE GUIDE

CleanCRM Studio

The Ultimate CRM Cleanup Guide

Prepare, Plan & Clean Your CRM
Without Breaking It

• 13 Step-by-Step Sections

• Checklists & Worksheets

• Governance Templates

• Maintenance Planner

A clean CRM improves sales productivity, reporting accuracy and marketing performance. This guide will help you prepare your CRM for a safe cleanup and provide practical steps that an in-house CRM administrator can complete before engaging a specialist.

1 Before You Touch Anything

The biggest mistake organisations make is deleting or changing data before understanding its impact.

- Always create a full backup before making bulk changes.
- Clean in stages rather than trying to fix everything at once.
- Test changes on a small sample.
- Document every significant change.
- Never bulk delete records without reviewing them first.

2 Assess Your CRM Health

Start by measuring the current state of your CRM.

- ☐ Total contacts
- ☐ Total companies
- ☐ Total deals
- ☐ Duplicate contacts
- ☐ Duplicate companies
- ☐ Missing email addresses
- ☐ Missing owners
- ☐ Unknown lifecycle stages
- ☐ Invalid phone numbers
- ☐ Missing required fields
- ☐ Bounced emails
- ☐ Unsubscribed contacts
- ☐ Inactive contacts
- ☐ Old leads
- ☐ Stale opportunities
- ☐ Workflows
- ☐ Forms
- ☐ Custom properties
- ☐ Reports

CRM Health Score Worksheet

Area	Score (1-10)
Accuracy	
Completeness	
Consistency	
Duplicates	
Automation	
Reporting	
Overall	

3Backup Your CRM

Export and save copies of all critical CRM assets before making changes.

- ☐ Export Contacts
- ☐ Export Companies
- ☐ Export Deals
- ☐ Export Tickets
- ☐ Export Custom Properties
- ☐ Export Workflows
- ☐ Export Pipelines
- ☐ Export Reports
- ☐ Export Dashboards
- ☐ Export Forms
- ☐ Export Lists

4Create a Cleanup Plan

Prioritise work based on business impact.

Problem	Impact	Priority	Owner	Completed

5 Remove Duplicate Records

- Review duplicate contacts and companies carefully before merging.
- Merge only when records belong to the same person or company.
- Review associated deals and activities before merging.
- Enable duplicate management tools where available.

6 Standardise Your Data

Create consistent naming conventions for states, countries, industries, job titles and phone numbers.

Instead of	Use
New South Wales / N.S.W.	NSW
United States / USA	United States
(04)1234 5678	+61 412 345 678

7 Fill Missing Information

- ☐ First Name
- ☐ Last Name
- ☐ Email
- ☐ Company
- ☐ Phone
- ☐ Country
- ☐ State
- ☐ Industry
- ☐ Lifecycle Stage
- ☐ Lead Status
- ☐ Contact Owner
- ☐ Persona

8 Review Lifecycle Stages

- Confirm every customer is marked as Customer.
- Ensure subscribers become leads only when appropriate.
- Review opportunities that never progressed.
- Archive obsolete lifecycle stages.

9

Audit Your Automations

- ☐ Lead assignment
- ☐ Notifications
- ☐ Lead routing
- ☐ Property updates
- ☐ Email automation
- ☐ Deal automation

10

Clean Up Pipelines

- ☐ Inactive deals
- ☐ Duplicate deals
- ☐ Lost opportunities
- ☐ Missing owners
- ☐ Old quotes
- ☐ Old tasks

11

Improve Reporting

- Archive unused reports.
- Review calculated properties.
- Validate dashboard KPIs.
- Remove outdated filters.

12

Build Data Governance

Document simple rules for future data entry to prevent your CRM becoming messy again.

- ☐ Required fields
- ☐ Naming conventions
- ☐ Import process
- ☐ Ownership rules

☐ Lifecycle definitions

☐ Monthly reviews

13 Monthly CRM Maintenance Checklist

Daily	Weekly
Review new contacts	- Check duplicates - Review imports - Fix missing owners
Monthly	Quarterly
- Review inactive contacts - Archive stale deals - Review automations	- Complete a full CRM audit - Review reports - Review custom properties - Review user permissions

! When to Call a CRM Specialist

Consider engaging a specialist if you have any of the following: multiple CRM systems, complex automations or integrations, compliance concerns, or more than 50,000 records. A specialist can help you avoid costly mistakes and accelerate your cleanup.

About CleanCRM Studio

CleanCRM Studio helps Australian businesses build clean, trusted CRM data through practical cleanup projects, governance frameworks and ongoing maintenance.

Free CRM Health Assessment

Book your FREE CRM Health Assessment to receive: CRM Health Score • Data Quality Assessment • Priority Fix List • Expert Recommendations — delivered within 48 hours.

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