

SMB HANDBOOK

CleanCRM Studio

CRM Data Governance Guide

Build a CRM Your Team Can Trust

A practical handbook for small and medium businesses

• Governance Principles

• Role Definitions

• Data Standards

• Maintenance Checklists

This guide provides practical governance standards to help small and medium businesses keep their CRM accurate, consistent and trusted. Good governance reduces duplicate records, improves reporting and helps sales and marketing teams work from the same source of truth.

1 Governance Principles

Accuracy	Only record verified information.
Consistency	Everyone enters data the same way.
Completeness	Required fields must always be completed.
Ownership	Every record has an owner.
Accountability	Data quality is everyone's responsibility.

2 Roles & Responsibilities

Role	Responsibilities
Marketing	Website leads, imports, personas, consent, campaign data
Sales	Contact updates, companies, deals, notes and activities
CRM Administrator	Governance, workflows, audits, reporting, duplicate reviews
Management	Approve standards and monitor compliance

3 Contact Standards

Every contact should contain the following minimum information:

- ☐ First Name
- ☐ Last Name
- ☐ Email Address
- ☐ Company
- ☐ Contact Owner
- ☐ Lifecycle Stage
- ☐ Country

Rules

- Search before creating a new contact.
- Never use placeholder email addresses.
- Assign an owner immediately.
- Update records after every customer interaction.

4 Company Standards

- Use one agreed company naming convention.
- Capture website, industry and country.
- Merge duplicate companies monthly.
- Do not create multiple companies for the same business.

5 Deal Standards

- ☐ Deal Owner
- ☐ Deal Value
- ☐ Expected Close Date
- ☐ Pipeline
- ☐ Stage
- ☐ Associated Contact
- ☐ Associated Company

6 Lifecycle Rules

- Document every lifecycle stage.
- Do not move contacts backwards without a valid business reason.
- Review contacts with unknown lifecycle stages monthly.

7 Duplicate Prevention

- Always search before creating a record.
- Review duplicate reports every month.
- Test imports before importing the full file.
- Enable duplicate management tools where available.

8 Import Policy

- ☐ Remove duplicates from the source file
- ☐ Validate email addresses
- ☐ Map all fields
- ☐ Test import with a small sample
- ☐ Review results before importing all records

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Naming Conventions

Field	Standard
States	NSW, VIC, QLD, SA, WA, TAS, ACT, NT
Phone	+61 format
Countries	Use full country names
Job Titles	Title Case

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Monthly Data Quality Checklist

- ☐ Review duplicate contacts
- ☐ Review duplicate companies
- ☐ Check missing owners
- ☐ Review unknown lifecycle stages
- ☐ Archive stale deals
- ☐ Review bounced emails
- ☐ Validate dashboards
- ☐ Review imports

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Quarterly Governance Review

- ☐ Review workflows
- ☐ Review forms
- ☐ Review custom properties
- ☐ Review permissions
- ☐ Review integrations
- ☐ Review reports
- ☐ Review pipelines

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The 10 CRM Rules

- 1 Search before creating a record.
- 2 Complete all required fields.
- 3 Keep naming consistent.
- 4 Update records after every interaction.
- 5 Assign an owner to every record.
- 6 Review duplicates monthly.
- 7 Test imports before importing.
- 8 Maintain lifecycle stages correctly.
- 9 Archive obsolete data regularly.
- 10 If unsure, ask before making changes.

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

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Get your CRM Health Score, Data Quality Assessment, Priority Fix List and Expert Recommendations — delivered within 48 hours.

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