

**FREE RESOURCE**

# CRM Data Hygiene Guide

A daily, weekly, monthly, and quarterly rhythm that keeps your client data trustworthy.

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## The problem

Most firms do not have a CRM problem. They have a CRM maintenance problem. Data rots: duplicates pile up, fields go stale, and within a year nobody trusts the system — so nobody uses it.

## Daily (5 minutes)

- ☐ Log every client and prospect interaction the same day it happens.
- ☐ Every new record gets a status, an owner, and a next action with a date.

## Weekly (15 minutes)

- ☐ Merge or flag duplicates.
- ☐ Close out dead prospects — move them to nurture or archive.
- ☐ Check for records missing key fields (email, phone, source, stage).

## Monthly (30 minutes)

- ☐ Review pipeline stages: does every stage still mean something? Retire dead stages.
- ☐ Audit user activity: is everyone logging consistently? Retrain where not.
- ☐ Spot-check 10 random records for accuracy.

## Quarterly (1 hour)

- ☐ Archive or delete records past your retention policy.
- ☐ Review field definitions with the team — rename what confuses people.
- ☐ Confirm integrations still sync correctly (calendar, email, forms).

### Want this built into your practice?

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