# HOW TO DEFEAT DUPLICATES IN YOUR CRM

## GOT DUPE DRAMA? YOU'RE NOT ALONE.

**For sales and marketing efforts to be successful, customers and prospects need to trust that you know them and where they are in their journey with your brand. After all, the 'R' in CRM stands for *relationship*. But what happens to that relationship when contact information exists in your CRM multiple times?**

Picture this:

- A prospective customer fills out a form on your website using their personal email, creating a new CRM entry.
- Later on, that same person reaches out to your team via their work email and your rep manually adds them to your CRM.
- Then, this person attends an event with your company. Your team imports a list of prospects that includes this same person on a separate record.

This person is now in your system three times. This means they're possibly hearing from three different reps, each of whom are working with different information. Sound familiar?

Boom. You've got a duplicate problem.

Data duplication is an inevitable and ongoing challenge for sales and marketing teams. But with the right strategy, teams *can* get ahead of their duplicates and prevent them from overrunning their CRM.

First, let's look at why duplicates are a problem for organizations. Then, we'll share three steps to stop them in their tracks.

**44%** of businesses say duplicate data seriously impairs their ability to use their CRM.

# 5 WAYS DUPLICATES HURT YOUR BUSINESS

**Duplicates prevent your team from engaging your customers and prospects in a meaningful way. A CRM that's bogged down with duplicates can lead to serious financial losses. These are just a few ways that duplicate data can hurt your business:**

1. **Inflated CRM costs:** Many CRM software vendors charge based on how many records you have. If you leave duplicates unaddressed, you're likely paying for more space than you need.

2. **Productivity losses:** Research suggests more than 45 percent of all new CRM entries are duplicates. If you add 1000 new contacts a month, nearly 450 could be duplicates—meaning your sales reps are wasting hours of time working each of those "unique" contacts when they could be closing deals.

3. **Inaccurate reporting:** It's impossible to measure how effective your outreach campaigns are when you're unknowingly targeting the same contacts via different email addresses. Your company's goals and budget will be based on incorrect information—which will lead to trouble when the truth comes to light.

4. **Employee turnover:** Even your most dedicated reps will grow tired of battling duplicates, especially if duplicates are stopping them from meeting their goals. Not to mention the awkwardness that can occur if a sales rep reaches out to a hot new prospect—only to find that this is a duplicate of an older record and they've been a customer for years.

5. **Revenue loss:** Each of the above limits your ability to effectively nurture leads and has a direct impact on your bottom line. Would you do business with a brand that keeps contacting you with offers that are irrelevant because they're based on stale information?

# THE DEDUPING CYCLE: 3 STEPS TO DEFEAT DUPLICATES

**Understanding how duplicate CRM data hurts your business is one thing. But actually finding, merging, and preventing duplicates requires a concentrated, ongoing effort across your customer-facing teams.**

**It's never-ending cycle: each step of the process leads to the next. Getting smarter about the process makes it easier to repeat time and time again.**

## STEP 1: IDENTIFY

It's safe to assume there are duplicates somewhere in your CRM. There's almost no avoiding it.

Unless you implement a software tool that can sweep your database to flag potential duplicates automatically, your reps will need to manually review your entries one by one.

When going the manual route, duplicate data commonly slips under the radar for a few reasons:

- **Company name variations:** A contact's company could be listed as IBM in one entry and International Business Machines in another.
- **Nicknames:** A contact could be listed under their LinkedIn name, Katherine, but might have completed a website form that created a separate record under their nickname, Katie.
- **Typos:** We all make mistakes, and some entries contain typos that make it harder to spot a duplication. For example, name@yahooo.com. This sneaky extra "o" may create a separate record if the correct address already lives somewhere in the database.
- **Formatting:** Entering a customer's phone number as 1-111-1111 instead of 11111111 or (111)-111-111 will impede your ability to identify potential duplicates. For international companies, adding a country code adds a whole new layer of potential confusion.

Start your deduping by using a software platform that scans your data to identify potential duplicates. Without such technology, you may have to resort to running a report or manually exporting your lists and sorting them by account name, contact name, email, or your preferred field to search for duplicates. Of course, doing so manually always adds more possibility for human error.

As you identify duplicates, look for patterns and note the potential ways that this duplicate data may be entering your CRM.

Before taking action, assess how the data is used across your company's various teams. This information will inform your deduping strategy and ensure you don't break any downstream dependencies or automations by deleting or merging a profile.

## STEP 2: MERGE AND ELIMINATE

With a base understanding of how prevalent duplicates are in your CRM, it's time to get cleaning! Again, you have two options here: conduct manual searches, or use software to flag potential dupes and accelerate your team's work.

First, you'll need to define exactly what constitutes a duplicate for your business and how your team should merge customer profiles in your CRM.

Technically, you can start anywhere with your deduping—some people will start with leads, others with accounts or contacts. Best practices for a streamlined approach to deduplication encourage us to dedupe accounts before contacts, and to dedupe leads before cross-object deduplication between leads, contacts, and accounts.

When done manually, this process will take a considerable amount of time. On average, it takes 50 hours to manually clean up 1,000 duplicate groups, as opposed to five minutes with a deduping solution.

If using a deduping software, make sure you check the following boxes:

- **Create matching rules:** A matching rule defines which fields are matched on to identify potential duplicates.
- **Implement fuzzy matching:** Instead of looking for only exact duplicates, establish fuzzy matching rules that can identify non-exact duplicates, like if words phonetically sound similar or if a business is known by multiple names.
- **Enable automations:** Set up a regular data sweeping process that automatically merges records based on saved settings and rules. This ensures your data stays clean even while you're away from your desk.

## STEP 3: PREVENT

Duplicates are like cockroaches—they always come back. Even after you're able to get your duplicate issues under control, more will make their way into your CRM. So, you need a plan to catch duplicates before they get out of control and affect other areas of your business.

This requires creating a company culture that understands the value of clean data.

To get started:

- **Involve department leadership:** You need executives to understand that duplicates have wide-ranging impacts on your company's bottom line. Align a group of cross-departmental leaders to devise a deduping strategy and allocate resources to support your efforts.
- **Document your rules:** Create a guide that explains your preferred processes for adding new CRM records or merging lists into your CRM. Make sure this is circulated amongst all CRM users at your org.

- **Create a protective barrier:** Alert CRM users if they are entering duplicate records as they work, or block and automatically merge records as they come in from website and system integrations. There are free tools in Salesforce to help do this, but we'd also recommend a dedicated solution like DupeBlocker, which is part of Validity DemandTools. Whichever path you take, look for a solution that keeps the end user experience and data needs in mind. For example, auto-merging features are valuable because a user can enter in a duplicate and have that data auto-merged into the existing record without interrupting their workflow, as opposed to blocking a dupe, which results in a warning or some sort of pop-up, and deviates from the end user's normal flow.
- **Train your sales and marketing teams:** Explain to all CRM users how the business uses the data in your CRM, from list creation to strategy effectiveness. Train them to be aware of the common ways duplicates enter your CRM and remain undetected. On the admin side, teach your team the best ways to find duplicates, either manually or with software. This awareness will empower everyone to work against the issue.

**60%** of marketing teams cite duplicate data as their biggest obstacle when pulling campaign lists.

# DEDUPING IS A NEVER-ENDING CYCLE

**Duplicates are an ever-present threat to your customer relationships and team productivity—and getting rid of them should be an ongoing priority.**

Assessing the common ways that duplicates enter your CRM, establishing ways to merge information, and using a deduping tool all make the process significantly easier and more effective over time.

But don't forget to grease the wheel! Your duplicate prevention strategy will evolve as your sales and marketing strategies change and you gain more customers. Revisit your strategy at least quarterly to see if new rules are needed or if there are other ways to catch and prevent dupes.

To learn how Validity DemandTools streamlines your duplicate management and helps you maintain a clean, duplicate-free CRM, start a free trial today.

**Start free trial**