Data Cleansing Checklist for the GDPR

Why Data Cleansing Is the First Step Towards GDPR Compliance

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Introduction

The clock counting down to the General Data Protection Regulation (GDPR) inches closer to zero. Maybe you've been procrastinating or maybe you just don't know where to begin; whichever is the case, it's time to get down to business and prepare for compliance.

Data cleansing is a massive portion of preparing for the GDPR, but it's a multi-faceted process that needs to be approached as such.

It's not just cleansing your data once and being done with it.

It's about examining — at a very high level — how your data is managed and maintained, cleansing your data, and implementing a process to ensure that a superior quality is maintained in your database.

Clean data needs to be an ongoing priority for your organisation; you simply cannot maintain GDPR compliance without a consistently clean database.

Consider this data cleansing checklist to be your guide towards GDPR compliance. Ready to get started?

Review Your Data Management Process

There's no point in cleansing your database if you have bad data habits in place that will just dirty it up again. To work towards a consistently clean database, you must first identify all of the ways your organisation collects and inputs new customer data.

In a given organisation, marketing, sales, and customer success (at the very least), are all handling and inputting new customer information on a daily basis.

According to the GDPR Report, "Mapping all incoming data flows will allow businesses to see how their data is managed and cleansed at all touchpoints. This will give data and compliance experts the insight they need to break down siloed working and ensure all customer information is treated with the same scrutiny when it comes to accuracy and permissioning."

The more touchpoints you have that handle data, the more likely you are to incur duplicate contacts or data errors.

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Consider Establishing a Single Customer View (SCV)

A single customer view (SCV) is a single location in which all of your data about each individual is held, thus allowing you to more effectively execute the steps necessary to comply with the GDPR.

Duplicate contact records, which will be discussed in detail later in this checklist, are a massive issue for database maintenance that stems from conflicting information existing in multiple locations.

An SCV allows you to rest assured knowing that you are looking at the complete (and only) picture in terms of the information you hold for that person when you pull a contact's data.

Most organisations typically have data in multiple systems, which results in duplicate data both within a system and between systems. An SCV eliminates the possibility of mix-ups when working in different systems and minimizes your chances of non-compliance.

Gather Net-New Contacts & Data from Third-Party Vendors

The GDPR regulations make it significantly riskier to procure contact data from third-party vendors. As such, it's best to cast as wide of a net as possible now to grow your database and secure permission before the regulation is implemented.

The months leading up to the GDPR would be best-spent casting a wide net to potential prospects in order to secure consent from as many contacts as possible before the GDPR regulations are imposed.

Marketers can locate net-new contacts & expand the breadth of their messaging in order to build the largest-possible contact list of consenting prospects whose contact data will still be usable once the GDPR is fully implemented.

Cleanse Your Data

Merge & Purge Duplicates

Duplicates in your CRM/MAP have long been a problem for B2B marketers, but with the implementation of the GDPR, duplicates go from being a nuisance to being a liability.

Let's say you have a customer named **"***Drew Ericson***."** You may have one contact record under *"Drew Ericson,"* which includes his name, current company, title, work phone number, and professional email address. You also, however, have a duplicate record for him under the name *"Andrew Ericson,"* which includes his current company, title, work address, and professional email address.

Drew Ericson

Company: TK Software Solutions
Title: Director of Marketing
Phone: (216) 343-8726
Email: drew.ericson@tk.com

Andrew Ericson

Company: TK Software Solutions
Title: Director of Marketing
Address: 2815 Hidden Trail Ln Cleveland, OH 44101
Email: drew.ericson@tk.com

The GDPR gives data subjects the right to know what information your company has about them. Therefore, Drew Ericson may contact you and ask for access to his personal information.

If you have duplicate contact records for him, there are a few things that could happen:

Scenario 1

Drew Ericson calls you up and asks for access to his personal information. You look in your CRM and find *Andrew Ericson*.

You tell him that you have access to his current company, title, work address, and professional email address (missing the fact that you also have his phone number listed under *"Drew Ericson")*.

Months later, you call Drew Ericson at work to inform him that he's won a customer raffle. Mr. Ericson was unaware that you had his phone number and is incensed that you've called him.

You have unknowingly broken regulations by not allowing him to access all of his personal information because of a duplicate contact record.

Or the following (equally problematic) situation could occur:

Scenario 2

In this scenario, both of the duplicate records contain his email address.

However, only one of the records shows that Drew Ericson has opted out of your email marketing communications.

A few months down the road, you send him a marketing email about a product update. Once again, Drew Ericson is angry that you've ignored his opt-out and you have potentially broken GDPR regulations.

These are just two of a number of scenarios that may befall you in a post-GDPR world if your database is littered with duplicates.

Identify Outdated, Incorrect, or Incomplete Information

From data entry errors to data decay from job transience, your database is likely riddled with errors. A trusted data cleansing provider can flag outdated data, as well as perform contact and email validation to assess the risk level of the email addresses in your database.

By cleansing old contacts from your system, you can more accurately calculate ROI for email campaigns, save money on data storage, and move a step closer to GDPR compliance.

> *For third-party marketing under the GDPR, clear, affirmative consent must be gathered from the data subject before the company may engage in communication with prospects.*

Run Permissioning Campaigns *Before* the GDPR Is Implemented

Gathering permission from your data subjects is perhaps the most important step in preparing for the GDPR, but it's counterproductive to start your permissioning campaigns until your data has been cleansed. Once your data is in order, you are ready to seek consent from your third-party marketing audience.

For clarity, it's important to differentiate between first-party marketing and third-party marketing according to the GDPR. "First-party marketing" simply means marketing to existing customers, which the GDPR deems to be in the 'legitimate interest' of the company and its customers. Therefore, businesses can market to them as long as they provide a clear opportunity to opt-out of communications.

"Third-party marketing", on the other hand, is essentially marketing to new prospects. For third-party marketing, clear, affirmative consent must be gathered from the data subject before the company may engage in communication with prospects.

That's not to say that the customer data you've gathered from third-party vendors is useless. It just means that you need to start the consent-gathering process now so when the GDPR goes into effect, you will already have your permissions in place.

Once you've gathered permission, all you need to do is maintain your data hygiene to ensure customer data stays accurate, up-to-date, and compliant as time wears on.

Implement a Regular Data-Cleansing Process

Data cleansing isn't a one-time action to mark off of your GDPR checklist and then never think about again. Contact data expires at a rate of 32% per year. Before the GDPR, this already presented a problem. But after the GDPR goes into effect, the natural decay of contact data becomes significantly more problematic.

Database hygiene, just like personal hygiene, should be an ongoing process. Cleansing your data once a year (or even once a quarter) simply isn't enough.

With the GDPR on the horizon, it's time to put a regular data cleansing system in place that keeps your data fresh and up-to-date on an ongoing basis.

65% *of U.K. organisations either cleanse their data only once a year, have no process in place at all, or don't even know how often their data is cleansed.* That's a number that must change in the months and years to come.*

Once you've validated your existing data, it's imperative to develop a formal, continuous data cleansing and enrichment process to maintain the accuracy of customer data and ensure compliance in spite of changes in customer information.

Partnering with a trusted data vendor is, in most cases, the easiest way to make ongoing data cleansing possible to guarantee that your data is always up-to-date and compliant.

*Source: Information-Age

Enjoy a Clean, Compliant Database

The GDPR may be a thorn in your side, but it has its upsides. While the GDPR requires a large amount of work for affected organisations, said organisations will ultimately benefit from the steps they take on their journey to compliance.

Poor data quality severely hampers even the best marketing efforts, and though it may be a laborious process, revamping your data cleansing and management process is bound to benefit you in the end.

By following the steps above, you are setting your organisation up for success in 2018 with a clean, compliant database.

About Synthio

Synthio is a new kind of customer data platform that helps B2B sales and marketing teams get to the right people faster. Outdated data, whitespace, misinformation, and technical hurdles can create a big gap between businesses and the people they're trying to meet, costing millions in wasted effort and missed opportunities.

Synthio closes the gap with the accuracy of a people-first approach, the ease of a self-service platform, and the promise of white-glove support. Since 2011, Synthio has served over 1,500 customers, including global companies like Oracle, Microsoft, and Gartner. Synthio has also been listed in the Inc. 5000, ranked among Georgia Technology's Top 40, and named one of Atlanta's Best and Brightest Companies to Work For. To learn more about how Synthio helps B2B marketers meet people where they are, visit www.Synthio.com.

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