



From: www.cio.com

Return of the Stupid CRM Data Corruption Tricks

– David Taber, CIO

May 19, 2011

In the spirit of David Letterman's occasional feature "Stupid People Tricks," it's time once again for a new list of common errors that lead to corrupted CRM records. We did the first Top 10 Data Corruption Tricks [a few months ago](#). Now it's time for the next layer of the onion...and yes, it may make you cry.

Last time, we focused on real-time corruption bloopers that happen in the course of data imports, data cleanup, and other mass update operations. Now we're looking at setup and configuration errors that lead to a mess over time. So here's David Taber-man's Top 10 List of Stupid Ways to Corrupt Your CRM Data...

Number 10: Specify ZIP Codes as Numbers

ZIP codes are numbers, right? Well, except for the spaces in international postal codes and the dashes in ZIP-9 codes. But the best part is what ZIPs- as-numbers do to New England postal codes: leading zero suppression. This gives some Massachusetts towns ZIPs that are 2 digits long. Yum.

Number 9: Set up Narrative Notes as Long-Text Fields

Notes are text. Perfect for long-text fields. Except when, over time, the Notes get so long that scrolling through 32,000 characters annoys the user. And when you can't really report on those long-text fields, or use them in filters. And when you need to merge records, causing one of the record's long-text fields to be thrown out in preference to the other. Narrative text should always go in related note or task records, not in the main data record for an account, contact, or deal.

Number 8: Overload Values

Remember the old trick of encoding more than one data item in a single field? Saves time, doesn't it? Just like it has over the last 50 years of IT...and in the long run, those overloaded values will become inscrutable or even unusable as your data evolves. Just like in the 80's, just say no.

Number 7: Ignore Who Owns the Record

In CRM systems, more than in any other kind of enterprise software, ownership of data is quite important (and politically sensitive). If you don't properly set record ownership, the proper sales/marketing person won't be able to see the data. So they'll create duplicate records that confuse everyone. Any time you do a data update, make sure to check that the record ownership is right before you hit "save."

Number 6: Set up lots and lots of data Validation Rules

This one is counter-intuitive, as the whole point of validation rules is to make sure that junk data never gets entered. Here's the problem: those pesky users. If you have too many data validation rules (or their corollary, required fields), the users will game the system with junk values that pass the rules, but lower data quality. Or, worse, they'll stop entering the data at all. This is a slippery slope you must watch out for.

Number 5: Don't Bother With the Semantic Details

Semantics are not just a matter of semantics. Get this wrong, and the credibility of your system data will be wiped out with every new data entry. Why? Because the data will be misinterpreted, put in the wrong categories, and cause false conclusions. Two reports that are supposed to show the same thing will contradict each other. While I'm not a big fan of large data dictionaries, getting the basic meanings under control is job one in CRM.

Number 4: It's time to play... "Confuse People with Contracts!"

The grand-daddy of semantic confusions in CRM is embodied in this sentence: "When Leads mature, they become opportunities and then close as Accounts." Can't spot the problems here? AAANNK!!! Thank you for playing...

Number 3: ISO want to Normalize Data

Many reports, dashboards, rules, and workflows in a CRM system need well-formed data to avoid the USA vs U.S.A. vs US vs United States of America problem. Even if set up by pick lists, long strings are problematic: that's why the two-character ISO-standard abbreviations were developed. Yet so many organizations resist using them for normalizing state and country fields.

Number 2: "We don't have time to de-dupe..."

Deduping is painful. Deduping is time-consuming. But that doesn't mean you can get away without it. Duplicate records (particularly those owned by different users) destroy data quality because users spread correct data entries across two or more incomplete records. But the data quality problem doesn't hold a candle to what dupes do to system credibility — embarrassment every time you run a report or dashboard.

And the Number 1 way to corrupt your CRM data...**Don't Bother with Frequent Backups**

While it's true that the leading SaaS applications do continuous backup for DR and data replication for business continuity, there are two critical truths about these backups. First, the SaaS vendors' backups are there to allow them to restore if they make a mistake and goof your data—but those restorals are anything but free if you make the mistake. Second, the SaaS vendors' backups are at best weekly. You probably have key data that evolves in critical ways every day — particularly in week 13 of the quarter.

Scoring

Of course your team and consultants will say they've never done these — they'll claim a score of zero. That means they're either hiding the truth or haven't been working under enough pressure!

David Taber is the author of the new Prentice Hall book, "[Salesforce.com Secrets of Success](#)" and is the CEO of [SalesLogistix](#), a certified Salesforce.com consultancy focused on business process improvement through use of CRM systems. SalesLogistix clients are in North America, Europe, Israel, and India, and David has over 25 years experience in high tech, including 10 years at the VP level or above.

Follow everything from CIO.com on Twitter [@CIOonline](#).

© 2010 CXO Media Inc.