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Top 10 Stupid CRM Data Corruption Tricks

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In the spirit of David Letterman's occasional feature "Stupid People Tricks," it's time once again for a new list of errors that lead to corrupted CRM records. Past quizzes have focused on SysAdmins and consultants, but now it's time to find out how your users and their business policies can contribute to data pollution.

So here's David Taber-man's newest Top 10 List of Stupid Ways Your Users Can Corrupt Your CRM Data. And yes, I've seen specific examples of every one of these this year.

Number 10: Connect Outside Systems Directly to Your CRM System

Whether it's a Web form, a direct integration adapter, or even a lowly file import, connecting your CRM system directly to an outside data source is an almost guaranteed mess. Either you get duplicate records, bad field updates, or -- for extra credit -- both! Better to use middleware, ETL tools, or internal code to trap the bad updates before they occur.

Number 9: Dedupe Accounts Without Considering External Systems

Everyone knows duplicate records are bad, but it's better to keep them around than to do fallacious merges. In most CRM systems, the account object is the top of the information pyramid. If your CRM system is integrated with anything outside, an account merge will cascade to several objects in the other systems...and they may not be able to comply. Or they pretend to comply, but immediately recreate duplicate objects back in your CRM. Since merges are not automatically reversible, do some real system engineering before you try merging accounts.

Number 8: Create a Lead Every Time

For a variety of reasons, users may insist that a new lead be created every time there's a prospect inquiry. This may be to give proper credit to partners, or show the yield of marketing events, or simply reflect a fear that "they'll never get that form fixed." This practice is a guaranteed dupe generator, frustrating users and almost guaranteeing bogus reports. Just say no: this is what activities, campaigns, and custom objects are designed to avoid.

Number 7: Insist that Leads and Contacts Can't be Deduped

Like Number 8, users will have lots of "good" reasons why leads can't be deduped against contacts. But deduping is a solid requirement -- there is no satisfactory alternative. So fix duplication issues at four levels: semantics, business process, system code, and administrative procedures.

Number 6: Use Lead Sources Instead of Campaigns

Most CRM systems have a lead source field on the lead, contact, and even opportunity objects. These are fine for toy systems, and they're immediately satisfying to the novice user. But they are an abomination because they can't represent the multiple "touches" that are the reality of sales cycles. Furthermore, in too many systems, users are allowed to change the lead source at will. The right path: use campaigns and activities that show the chronology of marketing actions and prospect responses.

Number 5: Don't Enter Any Information in the CRM Until Just Before the Deal Closes

A classic behavior stimulated by inappropriate sales management is sales reps not entering deals until the very last minute, to register their win with zero risk of losing. In itself, this doesn't corrupt data...but it does commit a deliberate sin of omission: you can't tell how long the sales cycle really takes, and you can't tell what your win-rate is. The corruption here isn't data, it's business process and management.

Number 4: Change the Amount Field When You Lose an Opp

Another classic of sales mismanagement is to allow reps to change opportunity amount values to $0 when a deal is lost. This is a great way to make it look like the only deals you lose are the worthless ones. A variation of this folly is to change the value of the opportunity amount field to the overall size of the prospect revenues. This is a great way of indicating the size of the target market, but it's an even better way of corrupting the meaning of the pipeline.

Number 3: Don't Lock Down Fields

Once things have started to percolate with a lead, contact, or opportunity, it's important to lock down the values of key fields: lead source, amount, close date, opportunity owner, etc. To not do this is to invite silly misrepresentations of your sales cycle.

Number 2: Let Users Delete Anything They Want

If fields must be locked down, the ability to delete entire records should be carefully regulated. Users tend to hide perceived weakness, so they'll delete records. Instead, these records should be zapped so they disappear from view, but can still be analyzed for process troubleshooting. Extra--Extra--Read all about it here.

And the Number 1 way for users to corrupt CRM data...

Let Users Write All their Own Reports

This isn't corrupting individual records, it's about corrupting the meaning of the data. Users will not make the right choices in objects, joins, filters, Booleans, formulas, concatenations...you get the idea. Avoid embarrassing confrontations between groups with their Great New Reports, all of which have the wrong answers. Instead, designate a dedicated report-building person who is the source for all CRM analytics, organization-wide. Yes, it will seem to slow you down. Except for when you care about the right answer.

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.*

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