

PHASE 8 – Data Management

Ensuring Accuracy, Security & Efficiency in CRM Data Operations

1. Introduction

Data is the lifeblood of any CRM. For HandsMenThreads, maintaining precise, secure, and well-structured data is essential for order accuracy, customer satisfaction, inventory health, and effective marketing. Phase 8 focuses on data import, data backup, deduplication, cleanup processes, and quality maintenance.

This phase ensures that all customer profiles, product information, order histories, and campaign records remain accurate and reliable as the system scales.

2. Bulk Data Import

During the initial CRM setup, HandsMenThreads imported legacy data from Excel spreadsheets that were previously used to manage customers, products, and order entries.

Data Imported

- **500+ Customer records**
- **200+ Product SKUs**
- **100 Sample Orders for testing analytics**

Import Tool Used

- Salesforce **Data Import Wizard**

Steps Followed

1. Cleaned and formatted CSV files
2. Mapped fields to Salesforce fields
3. Validated sample records
4. Imported batches
5. Verified import logs

Data Quality Enhancements During Import

- Email format validation
- Standardized phone numbers
- Removed duplicate SKUs

- Filled missing mandatory fields

3. Bulk Data Load Jobs

After import, the team checked:

- Job status (Success/Failure)
- Number of processed records
- Duplicate or failed rows
- Field mapping accuracy

Any rejected rows were cleaned and reprocessed.

4. Data Backup Strategy

A weekly automated export system was configured.

Tools Used

- Salesforce Data Export Service
- Exported in .zip packages
- Included all custom objects:
 - Customers
 - Products
 - Orders
 - Order Items
 - Campaigns

Purpose

- Disaster recovery
- Audit compliance
- Historical data preservation

Backups were stored offline in secured encrypted repositories.

5. Preventing Duplicate Records

Duplicate customer records lead to:

- Misleading loyalty calculations
- Incorrect analytics

- Confusion in communication

To address this, several measures were implemented:

a. Duplicate Rules

Trigger warnings when:

- Two customers share the same email
- Two SKUs match for products

b. Validation Rules

Ensure SKU uniqueness and proper formatting.

c. Manual Merge Tools

Salesforce's duplicate merge tool was used to clean older data.

6. Data Cleaning Procedures

Data cleansing ensures system reliability.

a. Customer Data Cleanup

Removed:

- Dummy emails
- Incomplete address fields
- Incorrect mobile numbers

b. Product Data Cleanup

Corrected:

- Misclassified categories
- Price inconsistencies
- Missing stock levels

c. Order Data Cleanup

Validated:

- Order totals
- Item quantities
- Date correctness

All cleanup processes were documented for future audits.

7. Monitoring Data Quality

Dashboards were created to monitor:

- Missing fields
- Duplicate trends
- Low-stock patterns
- Recently added products

Scheduled Reports

Daily and weekly reports notify admins of issues automatically.

8. Future-Proofing Data Management

HandsMenThreads' CRM is designed to scale. Future improvements include:

- Automated deduplication flows
- AI-powered record matching
- External data sync audits
- Real-time data validation plug-ins

9. Conclusion

Phase 8 ensures that the CRM's data foundation is strong, clean, and reliable. By implementing robust import processes, backups, duplicate prevention, and ongoing monitoring, HandsMenThreads is equipped with a stable system that supports accurate reporting, smooth automation, and high customer satisfaction.