

Clean Contact Import

UNDERSTAND AND ASSESS

TIME: 60 minutes | OUTPUT: A documented import plan, field map, and reconciliation checklist.

Name / team: _____ Date: _____

Use a working copy of your source file. Keep the original unchanged and confirm that you are authorized to use the data. This worksheet plans the import; verify the current requirements and available controls in your CRM before executing it.

Key idea

Decide whether you are creating records, updating existing records, or both. A matching identifier connects a row to the correct existing record. Never assume that matching names identify the same person.

Example: The source column Company size contains Small, Mid, and Large. The destination uses different approved options. Create an explicit mapping and review ambiguous values instead of silently replacing them.

What is the source, collection date, business purpose, and authorized use?

Are we creating, updating, or both? Which identifier will match records?

How many source rows exist? Record blank identifiers, possible duplicates, and rejected rows.

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BUILD YOUR WORKING PLAN

Map and validate each field

Add rows for your actual columns. Confirm dates, country values, phone formats, and dropdown options. Preserve leading zeros where meaningful. Do not infer consent, lifecycle stage, or ownership from missing data.

Source column	Destination / type	Cleaning or allowed values	Blank / overwrite rule
Email or record identifier			
First and last name			
Company / association			
Owner / lifecycle stage			
Source / consent evidence			

How will suspected duplicates be reviewed without losing valid records?

What sample covers new records, updates, blanks, and unusual values?

What export or record of prior values will support recovery if updates are wrong?

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VALIDATE AND TAKE ACTION

Completion checklist

- ☐ The original file is retained and the working copy has a version.
- ☐ Identifiers and duplicate rules are reviewed by an accountable owner.
- ☐ Destination properties, allowed values, and overwrite behavior are confirmed.
- ☐ A small approved sample has been checked in the destination.
- ☐ Unexpected automation, assignments, and notifications have been considered.
- ☐ Created, updated, skipped, and failed counts reconcile to the submitted rows.

Measure what changes

Reconcile counts using the import result categories provided by your CRM. Investigate unmatched totals; do not equate every submitted row with a newly created contact.

Our baseline / target / data source / review date:

Suggested implementation rhythm

Before import: approve mapping, sample, and recovery approach.

Immediately after: inspect values, associations, and triggered activity.

Next business day: resolve exceptions and retain the import log.

First action / accountable owner / due date:

Open issue / decision needed / approver:
