

CRM Data Governance

UNDERSTAND AND ASSESS

TIME: 60 minutes | OUTPUT: A starter data dictionary and a practical ownership routine.

Name / team: _____ Date: _____

Start with five fields that affect routing, reporting, segmentation, or customer experience. Include the people who enter the data and the people who rely on it. Expand the standards after the first review cycle.

Key idea

A data owner decides what a field means and how it should be used. A steward maintains quality day to day. A source of truth resolves conflicts when more than one system stores the same fact.

Example: Lead source records the agreed origin of an inquiry. The dictionary defines its allowed values and update rule. Campaign interaction history is tracked separately so later activity does not silently replace the original source.

Which decisions fail when CRM data is missing or inconsistent?

Which five fields should we standardize first, and why?

Which connected systems can create or overwrite these values?

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BUILD YOUR WORKING PLAN

Build a critical-field dictionary

For each property, also record its type, permitted users, retention or review requirement, and quality test in a copy of this worksheet. Avoid storing unnecessary sensitive information. Confirm applicable retention and consent rules with your responsible team.

Property / object	Definition / valid values	Owner / source of truth	Required when / update rule
Lead source			
Lifecycle stage			
Assigned owner			
Country / territory			
Consent evidence			

Who approves new properties, renamed values, and changes to definitions?

How are duplicates reviewed, and how is merge evidence retained?

How will access and integration changes be reviewed when staff or systems change?

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VALIDATE AND TAKE ACTION

Completion checklist

- ☐ Critical fields have clear definitions and accountable owners.
- ☐ Allowed values and required stages are documented.
- ☐ Integration precedence and overwrite rules are understood.
- ☐ Access is limited to the needs of each role.
- ☐ Duplicate review and correction procedures preserve useful history.
- ☐ A recurring quality review and issue log are assigned.

Measure what changes

Completeness: eligible records with a valid required value / eligible records reviewed. Track validity and duplicate issues separately so a populated but wrong value does not count as clean.

Our baseline / target / data source / review date:

Suggested implementation rhythm

This week: approve the first five property definitions.

This month: review a sample and fix root causes before bulk changes.

Each quarter: review access, integrations, unused fields, and policy changes.

First action / accountable owner / due date:

Open issue / decision needed / approver:
