EverReady

PRACTICAL GUIDE · 2026

CRM DATA HYGIENE

Essential tips to keep your CRM up to date

The common issues that erode CRM reliability, the fixes that work, and the best practices to keep every object clean, current, and trustworthy.

92%

of companies say their CRM fails to give a complete view of customer data

72%

of sales reps say data quality is a key driver of CRM adoption

20%

of contacts and sales activities are actually logged by users

WHY IT MATTERS

Clean CRM data powers every revenue motion

When contacts, activities, and deals are complete and current, every team downstream works from the same trustworthy picture. When they are not, the gaps show up as missed campaigns, blind spots, and forecasts nobody trusts.

Marketing

Never miss a single contact for your campaigns and events.

Sales execution

Get full customer insight to spot risks and unlock levers to close faster.

Activity tracking

Keep teams on track and monitor progress in every territory.

Deal forecasting

Know which deals are hot, stalled, or in danger, and act fast.

FOUR DATA DOMAINS THIS GUIDE KEEPS CLEAN

- Contact enrichment
- Activity capture
- Deal closing
- Sales forecast

COMMON ISSUES & SOLUTIONS

What breaks CRM data, and how to fix it

Missing or incomplete contacts

Poorly entered contacts undermine marketing, onboarding, execution, and deal visibility.

- ✓ **Real-time automated capture.** Create contacts from email signatures — reliable, complete, GDPR-compliant.

Outdated contact data

Contacts decay fast as people change roles or companies.

- ✓ **Out-of-office management.** EverReady updates the CRM when a contact leaves, using out-of-office replies.

Missing activity tracking

Unlogged emails and meetings create blind spots and unreliable reports.

- ✓ **Automatic activity capture.** Sync every interaction to the CRM, with privacy controls and business rules.

Unreliable lead tracking

You invest in lead gen without knowing handling time or campaign ROI.

- ✓ **Follow leads precisely.** Track response time, channels, and interaction dates across the cycle.

Duplicates

Duplicate accounts create confusion, hinder adoption, and skew reporting.

- ✓ **Use a unique identifier.** Automate account creation with identifiers like DUNS numbers.

Inactive data

Useless records overload the CRM, skew campaigns, and waste time.

- ✓ **Track last engagement.** Use creation date and last activity to find and clean inactive contacts.

Unstructured data

Free-text fields create inconsistency that complicates reporting and automation.

- ✓ **Prioritize picklists.** Enforce picklists and validation rules for consistent, accurate data.

Excessive fields

Too many required fields overwhelm reps and produce incomplete data.

- ✓ **Keep it simple.** Don't burden teams with admin fields that go unused or misfilled.

Multiple sync tools

Too many sync tools cause loops, duplicate data, and conflicts across emails and meetings, leading to inaccurate reports.

- ✓ **Define a scope.** Prioritize a single solution; where several are needed, define each one's goals and functional scope to avoid overlap.

BEST PRACTICES PER OBJECT

Keep every Salesforce object clean

Lead

- Standardized lead forms with mandatory fields
- Track engagement and status progression
- Remove leads never touched or re-engaged

Contact

- Auto-capture contacts from email signatures
- Enrich with GDPR-compliant data providers
- Flag leavers, keep them for history
- Remove inactive contacts with no engagement

Account

- Consistent naming and industry codes
- Regularly clean and validate account data
- Automate creation for complete, current data

Opportunity

- Clear stages with required fields
- Link all contacts and assign roles
- Auto-update from emails and meetings

Case

- Structured templates to capture all details
- Automate assignments and follow-ups
- Track status and resolution times

Activities (emails, meetings, calls)

- Auto-capture across every object
- Prioritize user privacy and data protection
- Use a secure, reliable solution
- Log standard records for accurate reporting

ACTIVITY TRACKING

Turn logged activity into visibility

Sales activity

- Track intensity week by week
- Monitor meetings by type over time
- Focus on the right accounts

Account visibility

- Engage key personas in the cycle
- Track engagement via interaction data
- Spot sponsors, blockers, deciders

Territory coverage

- Track team progress by territory
- Ensure focus on the right accounts
- Assess engagement per account

Deal forecasting

- Real-time view of engagement
- Use reliable data to challenge commits
- Spot high-potential and at-risk deals

DATA GOVERNANCE

Make hygiene a habit, not a cleanup

Data cleansing

- Quarterly check for missing, inaccurate, duplicate, outdated records
- Annotate fields with descriptions and ownership
- Regularly remove unused or outdated fields

Activity reports

- Monitor pipeline health: open opps, stage flow, conversion
- Track completeness, duplicates, outdated info
- Measure CRM usage: logins and updates per rep

Ongoing training

- Quick guides, videos, and regular coaching
- Support channel and clear data ownership
- Reward accuracy and establish rules

THE BEST ALTERNATIVE TO EAC

EverReady EAC vs. Salesforce EAC

A complete, privacy-first activity capture that goes beyond Salesforce Einstein Activity Capture, writing reliable data to standard objects with full history retrieval.

CAPABILITY	EVERREADY EAC	SALESFORCE EAC
Contact enrichment from email signatures	✓	✕
Salesforce standard records	✓	✕
Advanced privacy sync rules	✓	✕
Support for email aliases	✓	✕
Contacts, emails & meetings history retrieval	✓	✕
Synchronization on custom objects	✓	✕
Synchronization of email attachments	✓	✕
Microsoft Teams integration	✓	✕
Email conversation management	✓	✕

Keep your CRM ready, automatically

See how EverReady captures the activity your teams never log and keeps every object clean, current, and trustworthy.

Request a demo →

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