

Database Health Check

Twelve checks to run before January, and the three that matter if you only have an hour.

A database decays quietly. Nobody deletes a contact; people just change jobs, change numbers, and stop opening. A year later the list still looks the same size and works half as well. This is the annual audit — twelve checks, roughly two hours if you do all of them.

If you only have an hour, do 01, 04 and 09.

Duplicates, dead email addresses and untouched contacts. Those three account for most of the difference between a list that works and one that only looks like it does.

The twelve checks

- ☐ **01 Duplicate records**
Search by email, then by phone, then by last name plus street. Most CRMs only dedupe on email, which misses the same person entered twice with a work and a personal address. Merge rather than delete so you keep the history.
- ☐ **02 Contacts with no source**
If you cannot tell where someone came from, you cannot tell what is working. Tag every record with its true first touch. For anything genuinely unknown, use one consistent tag — not a blank.
- ☐ **03 Missing phone numbers**
Count them. A contact you can only email is worth roughly half a contact you can call. If the number is above 30 percent of your list, that is the gap to close before you spend on new leads.

☐ **04 Dead email addresses**

Pull your last few campaign reports and list every hard bounce. Those addresses will never work again. Leaving them in inflates your count, drags your deliverability, and on a per-contact plan you are paying for them.

☐ **05 Tags that mean nothing**

Read your whole tag list out loud. Anything you cannot define in one sentence gets merged or deleted. Dated tags from old campaigns are the usual offenders — they pile up and nobody ever filters by them again.

☐ **06 Contacts with no name**

A first name is the minimum for any personalised send. Fill what you can from email addresses and past transactions; flag the rest so they get a generic greeting rather than a blank one.

☐ **07 Past clients not marked as past clients**

This is the single most valuable segment you own and it is usually not a segment at all. Tag every closed transaction with the year. Everything in the next check depends on it.

☐ **08 Anniversary and birthday data**

Optional, but it is the cheapest reason to make contact you will ever have. Add close dates at minimum — you already have them in your files.

☐ **09 Anyone untouched in 18 months**

Filter by last activity. These people have not heard from you in a year and a half and no longer think of you as their agent. Decide deliberately: re-engage, or archive. Doing neither is the expensive option.

☐ **10 People who unsubscribed but are still being called**

Check that your email opt-outs are reflected wherever your calling list lives. Contacting someone who asked you to stop is a compliance problem, not just a rude one.

☐ **11 Duplicated households**

Two people, one address, one transaction. Link them rather than mailing the same household twice — it looks careless and it costs twice.

☐ **12 The list you forgot about**

The spreadsheet on your desktop. The old CRM you migrated from. The open house sign-in sheets. Somewhere there is a list that never made it in. Find it now, clean it once, and import it properly.

What your result means

CHECKS PASSED	WHERE YOU STAND	WHAT TO DO NEXT
10-12	Your database is an asset	Move on to segmentation and outreach. The data is not what is holding you back.
6-9	Normal, and worth fixing	Pick the three failures with the largest counts and fix those. You will feel the difference within one campaign.
3-5	The list is costing you money	You are paying to store and mail records that cannot convert. Clean before you spend anything further on lead generation.
0-2	Start again deliberately	A rebuild is faster than a repair at this point. Export, clean offline, re-import with a real field structure.

Do this once a year, in the same month.

October or January both work — one is before the year-end push, the other is at the reset. Pick one and put it in the calendar, because the audit that never gets scheduled never happens.

Before you start

- Export a full backup first. Every check below is reversible if you have the file; several are not if you do not.
- Work in one sitting per check rather than one sitting for all twelve. Partial passes are where inconsistency creeps in.
- Write down the count before and after each check. Next year those numbers tell you whether the habit is working.

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