

CRM Data Cleansing Checklist

Data Source Assessment

Evaluate the quality and completeness of the data within your existing systems.

Describe the primary data sources being assessed (e.g., spreadsheets, legacy systems, other CRMs).

Write something...

Estimated total number of records in the primary data source.

Enter a number...

Data Source Accessibility

- ☐ Fully Accessible
- ☐ Partially Accessible (Requires assistance)
- ☐ Limited Access (Requires special permissions)

Last Data Source Audit Date

Enter date...

Briefly outline any known data quality issues or concerns regarding the