

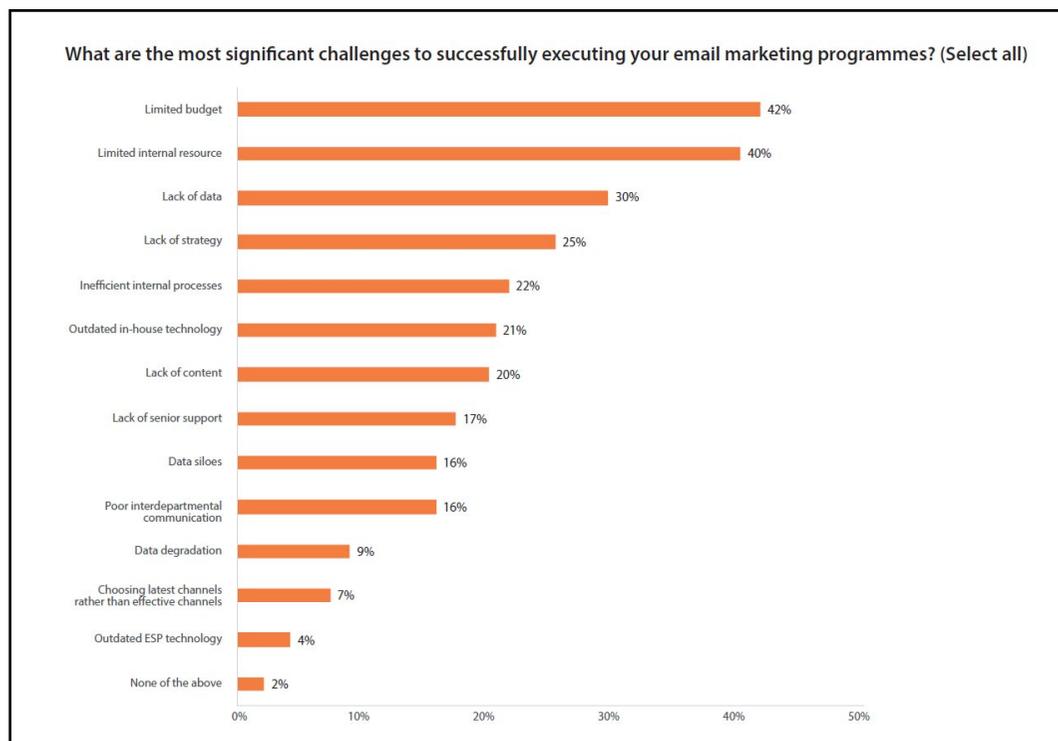
How to Conduct a Data Audit

Cheat Sheet

Research from the DMA Marketer Tracker shows that some of the most significant challenges for marketers include a lack of data, data siloes and data degradation. Without good quality and plentiful data, you will struggle to create a strategy (and one that will connect properly with subscribers to maximise your results) – another key challenge for marketers.

And without a solid strategy, how can you fight for resources and budget to help fulfil your plans – unsurprisingly the number 1 and 2 challenges marketers face.

So you see, all of these challenges are intrinsically linked back to your data.



Having an in depth understanding of what data you have in your business, where it is, how it is used and why it's collected is imperative to creating a solid email marketing strategy that is customer centric.

As a marketer it's absolutely critical that **YOU** have a really good insight into your current data situation so that you can use it to inform what you do now, and what you are able to do next.

The first place to start to get your data house in order is to conduct a data audit.

Conducting a data audit allows you to create a clear view of...

-  What you have right now in your business and available for your (email) marketing activities (as well as how it's currently being used)
-  What you have in your business that's not currently accessible to you (so that you can plan if you need this data and how to get access to it in the future)
-  What you don't currently have that you may need.

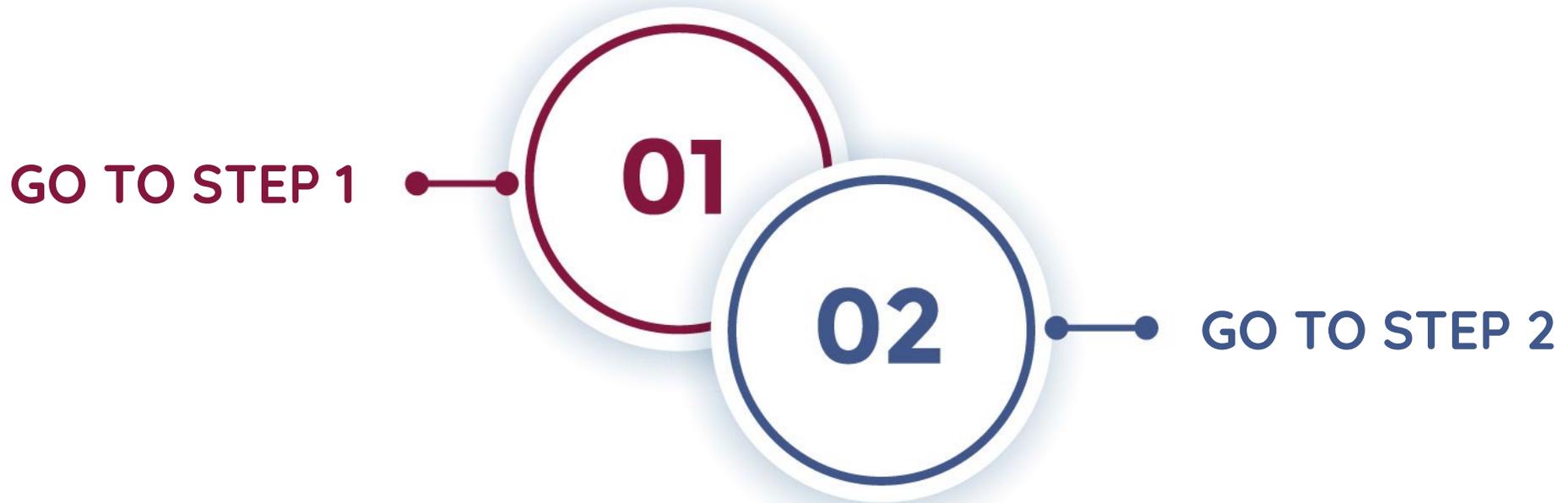
All of this will allow you to create much better email marketing plans that put your customers at the heart of everything that you do and allow you to have a better understanding of who they are and what they need, when.

How to Conduct Your Data Audit

In order to complete this audit, you will need input from other areas of the business; particularly your technology team (who most likely control the database), your ecommerce teams and other areas of marketing. Ask them to export a list of all the data fields you currently have stored to get you started.

When you know what you have and what's missing, you can start to fill these gaps and/or gather new data. You can also start to analyse the quality of your current data – for example, what percentage of your data fields have missing values, what percentage are incorrectly formatted? Can you trust the quality of your data?

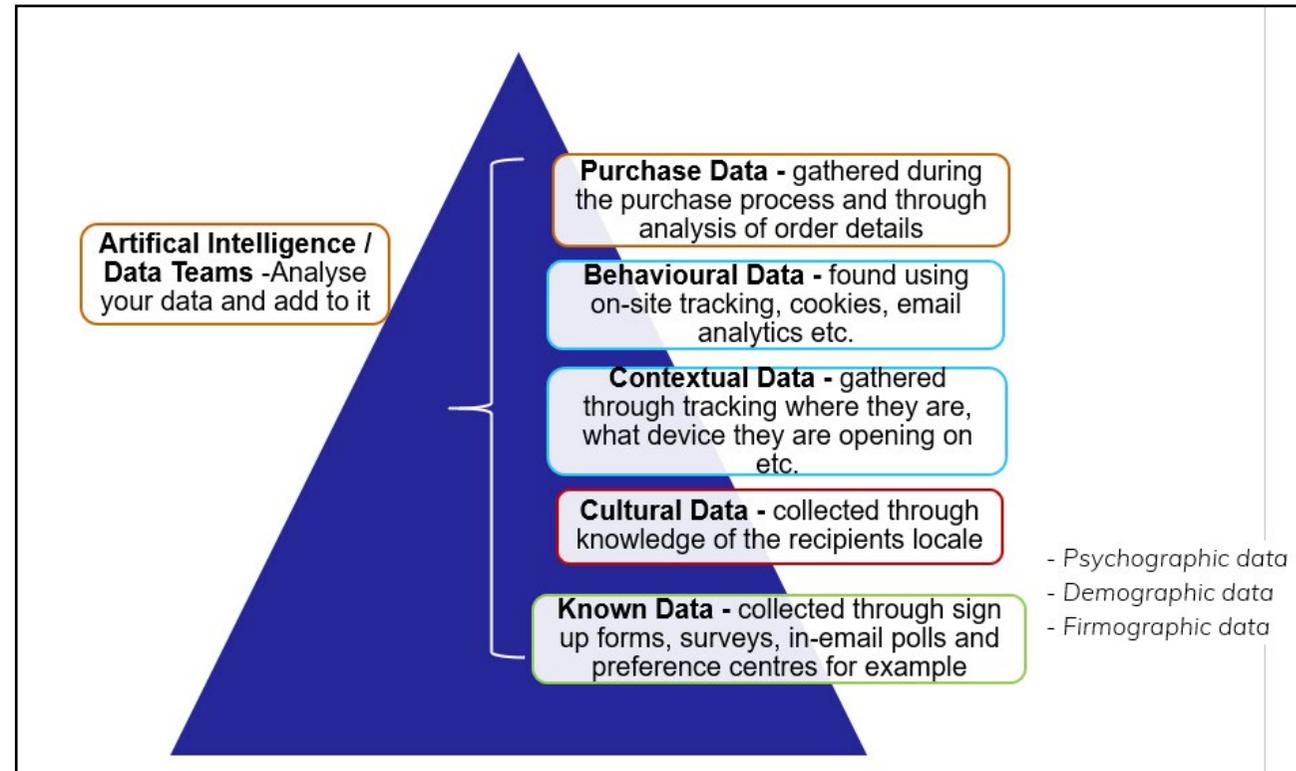
All of this will start to give you a clearer view of your data situation and allow you to create your current 'data dictionary'.



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What data do you currently have and where is it stored in your business?

List out all the data you currently collect directly from subscribers, track or analyse from different sources (these are described as data fields). Think about data you have across each level of the data pyramid.



Ask yourself these 4 questions to start with...

And don't forget, there are 3 ways to collect this data:

1. **Ask for it** – on your sign-up forms, in surveys/polls or in your preference centre for example
2. **Track it** – on site or through your marketing campaigns
3. **Analyse it** – to create additional data from multiple individual pieces and add a narrative

You'll also have a range of qualitative data from sources such as focus groups, user experience studies, surveys, Net Promoter Score (NPS), customer service feedback and social media; all of these will help you to understand the WHY behind your subscribers more and find their voice.

Where is this data found within your business?

Are you currently collecting this data in other areas of the business but it's not currently linked to your email subscriber list? If you are, why is this data not available in your email marketing system, and could it be made available for use?



Make a list of all the different systems within your business in which data may be stored, such as your ESP, CRM (Customer Relationship Management system), POS (Point of Sale software), website software, additional marketing channels and other systems.

Speak to the other departments within your business to ensure you have a clear picture of ALL data available and where it is currently stored (and why – are they using it for something that isn't related to email marketing?).

Which pieces of this data are you currently using within your campaigns?

Identify the data you're currently using in your email programme, how you are using it and why. For example, to identify specific segments for increased relevancy (*who is contacted, or not, as part of the current send strategy*) or to personalise content with customer information (*for example, pulling first name or the name of the last product purchased into your email content*).



Prioritise the data you have, based on value to your company and email marketing programme



Some data will be more valuable than others – for example, information about a customer's last purchase. Other data may be collected but not used by the business – in this case, you should consider whether or not this data is still needed going forward; don't collect and store data you don't need and are not going to utilise (don't forget to take note of how other teams are using this data so you don't get rid of something that is important to them!).

Once you have mapped the data that's currently in your business, you need to start to identify what you might additionally need or want and how you will go about accessing it....

NOTE: Add data that you don't currently have in a different colour so that you can identify its new and add a tick in the box of the spreadsheet for whether that piece of information is a NEED or LIKE to have.

What are you missing that you NEED to have?

What data do you not have that would be critical to fulfil your email marketing plans going forward – for example, additional purchase data?

What are you missing that you'd LIKE to have?

What data do you not have that would be nice to have but not essential, to further enhance your email marketing plans going forward?

You will continue to build on the answers to these last two questions as you expand your email marketing plans.

Why don't you currently have the information you need?

Is it because you're not collecting or tracking it? Think about what tracking you currently have in place to support behavioural and purchase data and what additional tracking may be needed to extend the data you have available in the future.

Or is it because it's currently stored in a different system within your business and not currently accessible to you?

The answers to these questions will allow you to identify each of these problems and create a plan accordingly to either start collecting, or gain access to this data for future use.

How to Record Your Data Audit

Data Field Name	Data Field Description	Data Pyramid Area	Where is this data located?	How is this data collected?	How is it currently used?	Data importance level (1 being low & 10 high)	Like to have	Need to have	Why don't currently have	Segments could you create?
First Name	Recipients first name	Known Data	CRM system	Sign Up Form / Preference Centre	To personalise emails e.g. with 'Hi First name'	2				
Value of Last purchase			eCommerce Platform		NOT		✓			RFM Analysis

You can be as in depth or as high level as you want with this activity, and dependent on your business needs.

You can add even more explanation to this spreadsheet as you start to build out your data dictionary – for example, you might start to add commentary about other ways to ascertain the data (such as increased tracking) or how it can be used in connection with other pieces of data (e.g. for RFM analysis).

Once you start to get a clear view, you will see missing pieces and connections you didn't know were possible – opening up a whole world of new strategic areas to help you better communicate with your audience in a way that is meaningful and helpful to them.

Want to find out more?

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About eFocus Marketing

eFocus Marketing is a leading specialist email marketing agency.

The eFocus Marketing team provides a dedicated email marketing resource to ecommerce companies looking to optimise, automate and grow their email marketing programme.

From strategic consulting, to full service management and training, we address every aspect of an email programme to produce successful email marketing campaigns. If you want to boost your conversions, fix deliverability problems or increase response rates, you need to ensure you are communicating with subscribers at every stage of the email marketing lifecycle.

Our team of experts will work out the best options for your business and offer solutions in bite-size pieces so that you can focus on quick wins that will increase your success as well as longer term changes to become a better sender and increase your results.

eFocus Marketing can assist you in making the most of your campaigns through the following services:

- **Email Marketing Consultancy**
- **Bespoke In-house Training**
- **Implementation & Management**



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