

Database Cleanup Checklist

An optimized database empowers your teams to best leverage your data. This checklist will help you prioritize this process.



Break the process into smaller projects. Start with major donors or volunteers first.



Remove lists, views, and workflows that aren't in use. Check any triggers to ensure no other aspect of the database is impacted by eliminating these.



Cross-check email addresses and phone numbers with your marketing platform. Remove email addresses that have bounced and phone numbers that are no longer in service from constituent records.



Perform NCOA or Address Verification Services to ensure constituent addresses are up to date. Purge old addresses from the database.



Evaluate old engagement data such as interests and participation. Are you still actively using or tracking these types of records? Are there different types of measures that would be more meaningful? Is there any historical significance that would be lost if these outdated measures were removed?



Review the users in your database – do they still need the same permission levels? Has anyone left your organization that you haven't removed from the database?



Evaluate your integrations – are they up-to-date? Do the data points map to the right fields? Are you still using the integrations? Are you using them to their full potential via automations or workflows?

Remember: Your database can help you out!



Your system may offer duplicate detection to identify, merge, and deactivate duplicate records. To avoid overwhelming database administrators, conduct this process in a tiered structure.

- 1 Start with constituents in portfolios.
- 2 Then address constituents with donations that are not in portfolios (may need to break these constituents into smaller groups based on donation size).
- 3 Finally, use bulk record deletion to remove inactive constituent records from the system.
- 4 Then address constituents without donations but have engagement data (event attendees, volunteers, etc.).

A fully integrated CRM such as StratusLIVE 365 makes data maintenance a much more manageable task.

Learn more about our mission-built CRM product [here](#).