Data Debt Liquidation Framework

A practical checklist for identifying, prioritising, and reducing CRM, reporting, and operational data debt.

Diagnose

1. Map every source of customer, lead, campaign, and revenue data.

2. Identify duplicate, incomplete, inconsistent, and obsolete records.

3. List manual reconciliation steps and recurring reporting delays.

Prioritise

1. Rank issues by revenue impact, compliance risk, and effort.

2. Separate urgent fixes from long-term governance improvements.

Clean and Connect

1. Standardise fields, naming conventions, ownership, and lifecycle stages.

2. Create deduplication and validation rules.

3. Connect CRM, reporting, and workflow systems.

Automate and Visualise

1. Automate recurring transformations and reports.

2. Create trusted executive KPIs with clear definitions.

Govern

1. Assign data owners.

2. Document rules and change controls.

3. Run monthly health checks and quarterly audits.

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