



Data Pull Instructions

Step 1:

Pull CRM database if available. If CRM has all customers and prospects from lists no need to go to step 2 or 3

Step 2

Pull all Accounting or Service System Databases of Customers if not all in a CRM database

Step 3

Any excel spreadsheets of prospect lists purchased or compiled

Excel or CSV formats are ideal

Data is often the reason for campaign delays. Improperly formatted data can take weeks to prepare for use in marketing campaigns. We suggest you use the attached template to guide you in your data preparation. These are suggested and not mandatory guidelines. We provide these guidelines to make easier as you pull the data from the various sources correctly or if the options are available to export data in different ways to create efficiencies.

End goal is to get the data pulled with least amount of clean up. We understand that not all systems are created equal, and that formatting and cleanup will be needed in most cases and our team is willing to assist.

Ideal data columns needed for Marketing

CRM ID – If your data comes from an existing CRM, please include the contacts unique ID number with your data.

Names – First name, last name and middle name should be separated into different columns for use in email and print personalization. We also suggest you have a nickname column for the same reason. If a contact's name is William, but everyone calls him Bill, you may want to address the piece to William and refer to him as Bill in the copy. Therefore, creating a column called nickname is suggested in these cases.

Email – Emails are essential for most automated marketing platforms. Some will not load a contact without a unique email. While not mandatory, emails often indicated campaign success so it is important to include as many as you possibly can.

Phone – While not as crucial as email, phone numbers are important for some aspects of modern automated marketing. E.g. text campaigns and ringless voicemail.

Company name – Another crucial element for marketing personalization is company name. We suggest a company nickname column to help set a conversational tone. It can be awkward to refer to “Williams and Black Manufacturing Company, LLC” when the company is generally known as “Williams and Black”.

CRM Account ID – If your data comes from a CRM and has account IDs separate from contact IDs please include those account ID numbers.

Sales Rep – If you have sales rep information, including Sales Rep email, it allows us to set up automated triggers to contact the rep when the client engages in your campaign.

Industry – Industry is another way to address a prospect in a personalized manner. The more data you can include the better. This information helps us prepare version content based on who we are speaking to.

Address – Address information should be separated into Street Address, City, State and Postal Code Columns. Please include suite or office numbers with the Street Address. We would prefer physical addresses to PO Box numbers.

General Guidelines

- Use proper upper and lower case. All caps is an issue when data is used in marketing campaigns.
- If more than one contact at an organization, please make sure addresses are entered consistently
- Be careful with company name abbreviations. (E.g. Golf Association not listed as Golf Ass. For incorrect use)
- Phone numbers are best formatted 999-999-9999

Remember, these are all just guidelines, not requirements.