



STRIVE
FREELANCING AGENCY

CASE STUDY

CRM & Data Cleanup

Illustrative Sample Case Study

STRIVE helped a growing business clean, structure, standardize, and organize CRM records and scattered business data.

The result: better accuracy, clearer reporting, and more efficient follow-ups that drive growth.



INDUSTRY:
Sales / Service
Business



SERVICE:
CRM & Data
Cleanup



TIMELINE:
4 Weeks



TOOLS:
Excel, Google Sheets,
CRM, CSV, Data Review



DATA CLEANUP CHECKLIST

- ☒ Remove Duplicates
- ☒ Standardize Fields
- ☒ Fix Inconsistencies
- ☒ Validate Data
- ☒ Fill Missing Values
- ☒ Organize & Structure
- ☒ Final Quality Review

CRM DATA TRACKER

TOTAL RECORDS
1,248

DUPLICATES REMOVED
156

RECORDS CLEANED
1,092

DATA QUALITY SCORE
98%

CLEANED DATA (SAMPLE)

Contact Name	Company	Email	Source	Status
John Smith	ABC Solutions	john@abc.com	Website	Active
Emily Davis	XYZ Services	emily@xyz.com	Referral	Active
Michael Lee	Bright Ideas Co.	michael@brightideas.com	Social Media	Active
Sarah Johnson	Greenfield Inc.	sarah@greenfield.com	Website	Active
David Brown	NestGen Ltd.	david@nextgen.com	Referral	Active
Jessica Wilson	Prime Solutions	jessica@prime.com	Website	Active
Daniel Martinez	Elevate Group	daniel@elevate.com	Social Media	Active
Laura Taylor	Summit Co.	laura@summit.com	Referral	Active

CLEANUP SUMMARY

Duplicates Removed: **156**

Fields Standardized: **28**

Missing Values Filled: **312**

Records Cleaned: **1,092**

Data Quality Score: **98%**

*Data you can trust.
Decisions you can scale.*





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CASE STUDY

Client Overview

Business context at a glance

STRIVE partnered with a growing sales / service business that needed clearer CRM organization and cleaner business data to improve outreach, reporting, and follow-up management.



BUSINESS TYPE:
Sales / Service Business



TEAM SIZE:
Small growing team



PROJECT TYPE:
CRM cleanup and data standardization



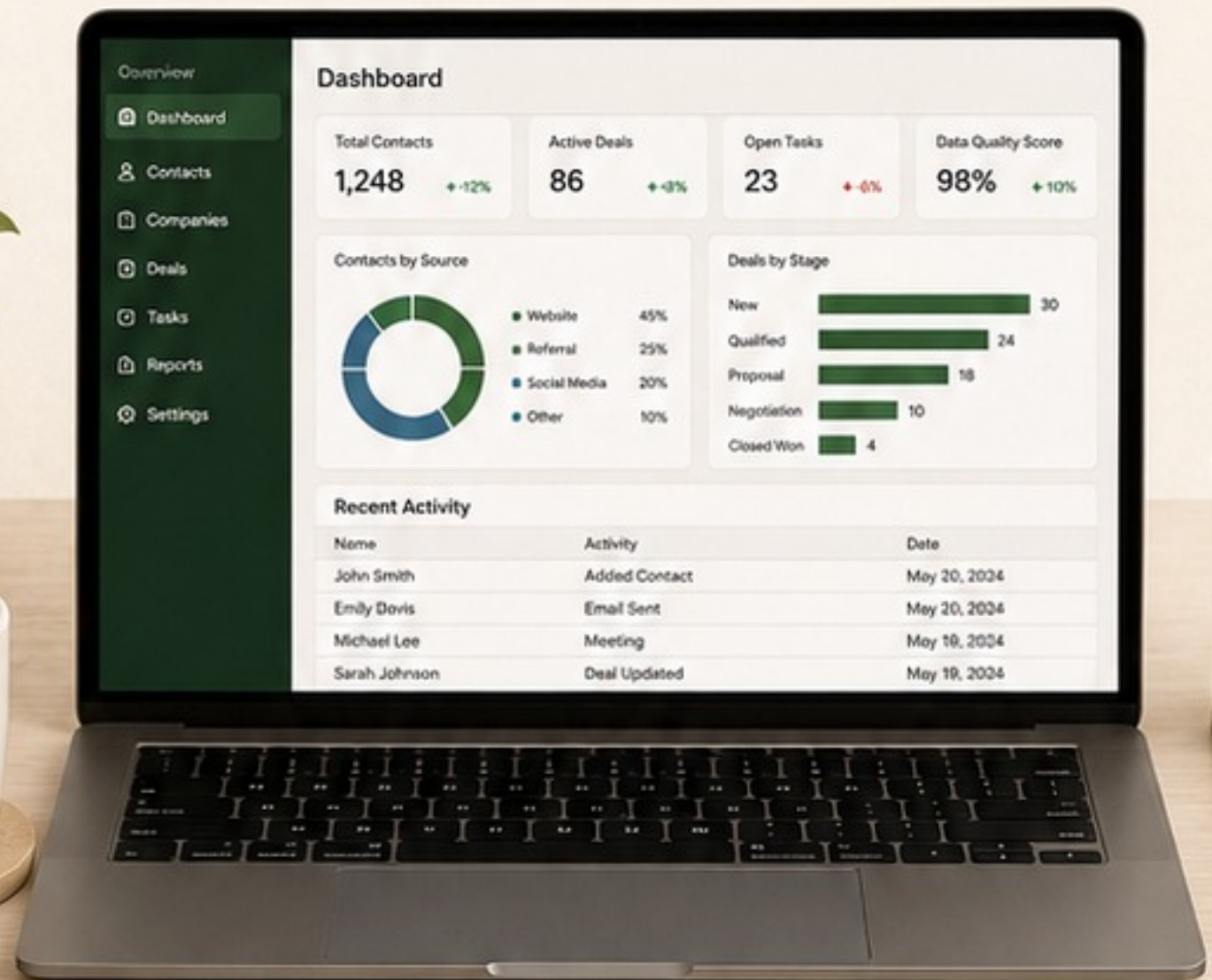
MAIN GOAL:
Accurate, organized customer records



DATA SOURCES:
CRM export, spreadsheets, CSV files, lead lists



FOCUS AREAS:
duplicates, missing fields, standardization, status cleanup



CLEANED CONTACT LIST (SAMPLE)

Name	Company	Email	Status
John Smith	ABC Solutions	john@abc.com	Active
Emily Davis	XYZ Services	emily@xyz.com	Active
Michael Lee	Bright Ideas Co.	michael@brightideas.com	Active
Sarah Johnson	Growth Partners	sarah@gp.com	Active
David Brown	NextGen LLC	david@nextgen.com	Active
Jessica Wilson	Prime Solutions	jessica@prime.com	Active
Daniel Martinez	Elevate Group	daniel@elevate.com	Active
Laura Taylor	Summit Co.	laura@summit.com	Active

FIELD MAPPING SHEET

Source Field	Mapped To	Field Type	Notes
Full Name	Contact Name	Text	Standardized
Email Address	Email	Email	Validated
Company Name	Company	Text	Standardized
Phone	Phone	Phone	Formatted
Lead Source	Source	Picklist	Mapped
Status	Status	Picklist	Standardized
Created Date	Created Date	Date	Formatted

DATA AUDIT SHEET

Check	Issue Found	Count	Action Taken
Duplicate Contacts	Yes	156	Merged
Missing Emails	Yes	228	Flagged
Missing Phones	Yes	312	Flagged
Invalid Emails	Yes	74	Cleaned
Standardization Issues	Yes	289	Standardized
Inactive / Old Leads	Yes	191	Archived

CLEANUP SUMMARY TRACKER

 TOTAL CONTACTS 1,248	 DUPLICATES REMOVED 156	 MISSING VALUES FLAGGED 540
 RECORDS STANDARDIZED 1,092	 DATA QUALITY SCORE 98%	 TASKS COMPLETED 23



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Client Challenge

What needed to improve

Before STRIVE stepped in, the business faced critical data issues that created friction, wasted time, and limited growth.



- 1** **DUPLICATE CONTACT RECORDS**
- multiple entries for the same customer

EXAMPLE: SAME CONTACT, 3 RECORDS

	John Smith	john.smith@email.com
	John Smith	johnsmith@email.com
	J. Smith	jsmith@email.com

⚠ Leads to confusion and wasted outreach.

- 2** **MISSING KEY FIELDS**
- phone, email, status, owner, or source data incomplete

EXAMPLE: INCOMPLETE RECORD

Name:	Emily Davis
Email:	—
Phone:	—
Status:	—
Owner:	—
Source:	—

⚠ Important details missing, follow-ups get delayed.

- 3** **INCONSISTENT FIELD FORMATTING**
- naming, dates, tags, and statuses entered differently

EXAMPLE: SAME DATA, DIFFERENT FORMAT

Name:	Sarah Johnson	5/19/24
Name:	sarah johnson	19-05-2024
Client:	SARAH JOHNSON	May 19, 2024
Status:	Qualified	QUALIFIED

⚠ Hard to search, filter, and analyze accurately.

- 4** **OUTDATED LEAD STATUS**
- inactive or incorrect follow-up stages in the CRM

EXAMPLE: STALE LEAD STATUS

New	Contacted	Qualified	Proposal Sent	Closed Won

⚠ Leads fall through the cracks; lost opportunities.

- 5** **SCATTERED DATA SOURCES**
- information spread across spreadsheets, exports, and manual lists



⚠ No single source of truth, updates are inconsistent.

- 6** **LOW REPORTING RELIABILITY**
- dirty data reduced dashboard accuracy and team confidence



⚠ Decisions become risky without trustworthy data.



These challenges created data chaos, reduced productivity, and made it harder to **grow with confidence**.





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Goals & Priorities

What needed to improve first



01



Remove duplicate records

Eliminate duplicates to ensure accurate counts, reporting, and communication.

02



Standardize field values

Normalize formats and values across fields for consistency and better insights.

03



Fill missing essential data

Complete key fields to improve segmentation, automation, and data quality.

04



Clean lead stages and statuses

Align and tidy stages for a clear, actionable pipeline and better workflow tracking.

05



Improve reporting reliability

Ensure reports reflect true data for confident decisions and forecasting.

06



Create a reusable cleanup structure

Build a repeatable framework to keep data clean and scalable over time.

PRIORITY MATRIX



We focused on high-impact areas first to deliver visible results quickly while building a strong data foundation.

PRIORITY FOCUS CHECKLIST

01		Remove duplicate records	HIGH
02		Standardize field values	HIGH
03		Fill missing essential data	HIGH
04		Clean lead stages and statuses	MEDIUM
05		Improve reporting reliability	MEDIUM
06		Create a reusable cleanup structure	MEDIUM



Clear priorities create cleaner data—and cleaner data powers smoother operations, better decisions, and measurable growth.





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STRIVE Solution

How the workflow was improved



1 Source audit and data review

We analyzed all CRM sources to understand data quality, structure, volumes, and inconsistencies.



2 Duplicate check and record merge rules

We identified duplicates and applied smart merge rules to keep the most accurate and up-to-date records.



3 Field mapping and standardization

Fields were mapped, renamed, and standardized for consistency across the entire CRM.



4 Missing data validation and enrichment

We validated missing or incomplete data and enriched key fields to improve record quality.



5 CRM structure cleanup and status correction

We cleaned up unused data, corrected statuses, and organized records into the right structure.



6 Final review and handover system

We performed a final QA review and delivered a clean, reliable CRM ready for daily business use.



CRM CLEANUP CHECKLIST

- ☒ Source Audit Completed
- ☒ Duplicates Identified
- ☒ Merge Rules Applied
- ☒ Field Mapping Done
- ☒ Missing Data Checked
- ☒ Structure Cleaned
- ☒ Status Corrected
- ☒ Final Review Done
- ☒ Ready for Handover

FIELD MAPPING SHEET

Source Field	Mapped To	Standardized As	Data Type
First Name	First Name	First Name	Text
Last Name	Last Name	Last Name	Text
Email Address	Email	Email	Email
Company Name	Company	Company	Text
Phone No	Phone	Phone	Phone
Lead Source	Source	Source	Picklist
Status	Status	Status	Picklist
Created Date	Created Date	Created Date	Date

CLEANED CONTACT (SAMPLE)

First Name:	John
Last Name:	Smith
Email:	john.smith@abcsolutions.com
Phone:	+1 (555) 123-4567
Company:	ABC Solutions
Source:	Website
Status:	Active
Owner:	Sales Team
Created Date:	May 20, 2024

MERGE RULES (SAMPLE)

Rule 1: Match by Email
Keep most recently updated record.

Rule 2: Match by Phone
Merge and retain record with complete data.

Rule 3: Match by Name + Company
Review manually if multiple matches.

FINAL HANDOVER NOTES

- ☒ All data cleaned and validated
- ☒ Duplicates removed and merged
- ☒ Fields standardized and mapped
- ☒ Missing data enriched
- ☒ Statuses reviewed and corrected
- ☒ CRM structure optimized
- ☒ QA completed and verified
- ☒ System ready for daily use

*Clean data. Clear insights.
Stronger growth.*



1 AUDIT

Assess and analyze all data sources



2 CLEAN

Remove duplicates and tidy records



3 STANDARDIZE

Map fields and standardize data



4 VERIFY

Validate accuracy and completeness



5 DELIVER

Handover clean CRM ready for growth



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CASE STUDY

Work Process

From requirement to final delivery

A structured, transparent, and quality-focused process that ensures clean data, reliable reports, and measurable results.

1



REQUIREMENT

Understand records, fields, goals, and reporting needs

2



PLANNING

Define cleanup rules, structure, and validation checks

3



EXECUTION

Clean duplicates, fill gaps, standardize, and update statuses

4



QUALITY CHECK

Verify accuracy, sample review, and cross-check reports

5



DELIVERY

Share cleaned files, summary notes, and recommended next steps



CLEAR PROCESS. CLEAN DATA. CONFIDENT DECISIONS.



INPUTS

- CRM Exports (CSV / Excel)
- Field Definitions & Business Rules
- Reporting Needs & KPIs
- Historical Notes / Reference Files
- Access Guidelines & Priorities



CHECKS

- Duplicate Detection
- Missing / Incomplete Data
- Format & Consistency
- Standardization Validation
- Cross-Report Verification



OUTPUT

- Cleaned Data Files (CSV / Excel)
- Data Quality Score & Summary
- Change Log & Key Fixes
- Recommended Next Steps
- Ready-for-Use Reports



Data you can trust. Decisions you can scale.





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Deliverables

Project outputs

01 CRM Audit Summary

A complete audit of your CRM highlighting data quality issues, gaps, and improvement opportunities.

CRM AUDIT SUMMARY



Total Records
1,248

- Valid & Clean 58%
- Duplicates 18%
- Incomplete 14%
- Standardized 10%

Overall Data Quality Score **62%**

02 Duplicate Merge Rules Sheet

Custom merge rules and logic applied to identify and safely consolidate duplicate records.

DUPLICATE MERGE RULES

Rule	Match Criteria	Keep Primary	Action
1	Email (Exact)	Oldest Created	Merge
2	Email (Fuzzy)	Most Complete	Merge
3	Phone (Exact)	Oldest Created	Merge
4	Company + Email	Most Complete	Merge
5	Name + Phone	Most Complete	Merge

03 Field Standardization Guide

A mapping and standardization guide to ensure consistent formats, values, and naming conventions.

FIELD STANDARDIZATION GUIDE

Field	Standard Format / Rule	Example
First Name	Title Case	John
Last Name	Title Case	Smith
Email	Lowercase	john.smith@email.com
Phone	E.164 Format	+1 555 123 4567
Company	Title Case	Strive Solutions
Source	Controlled List	Website
Status	Controlled List	Active

04 Cleaned Contact Database

A fully cleaned, deduplicated, and standardized contact database ready for reliable use.

CLEANED CONTACT DATABASE (SAMPLE)

Name	Company	Email	Phone	Status
John Smith	XYZ Services	john@xyz.com	+1 555 123 4567	Active
Emily Davis	ABC Solutions	emily@abc.com	+1 555 987 6543	Active
Michael Lee	Bright Ideas Co.	michael@brightideas.com	+1 555 246 8012	Active
Sarah Johnson	Growth Labs	sarah@growthlabs.com	+1 555 369 1470	Active
Daniel Martinez	Elevate Group	daniel@elevate.com	+1 555 753 2580	Active

Total Cleaned Records **1,248**

05 Status & Pipeline Cleanup Tracker

A tracker showing status corrections, pipeline updates, and overall cleanup progress.

STATUS & PIPELINE CLEANUP TRACKER

Pipeline / Status	Before	After	Records Updated
New Lead	312	298	246
Contacted	276	284	230
Qualified	198	214	198
Proposal Sent	124	132	112
Negotiation	86	92	78
Closed Won	54	58	46
Closed Lost	40	40	0

Total Records Updated **910**

06 Final Handover Notes

A summary of work completed, key changes, recommendations, and next steps for your team.

FINAL HANDOVER NOTES

- Work Completed**
 - CRM audit, cleanup, deduplication, standardization, and pipeline updates
- Key Changes**
 - Duplicates merged, fields standardized, statuses & pipelines aligned
- Recommendations**
 - Maintain data hygiene, use validation rules, and schedule regular reviews
- Next Steps**
 - Review outputs, implement recommendations, and reach out for ongoing support

“Every deliverable was prepared in a clear, organized, client-ready format.”



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Before & After



How the process changed

BEFORE		AFTER
 duplicate contact entries Multiple records for the same person across lists.	➔	 unified customer records Single, accurate record for every contact.
 incomplete fields Missing details and inconsistent data entry.	➔	 cleaner, more complete profiles Standardized, complete information across all records.
 inconsistent tags and statuses Confusing labels and mixed naming styles.	➔	 standardized CRM structure Consistent tags, statuses, and naming conventions.
 scattered lists Data spread across multiple spreadsheets and sources.	➔	 centralized organized data source All data in one reliable, well-structured system.
 unreliable reports Inaccurate numbers and limited visibility.	➔	 clearer reporting and better follow-up visibility Accurate insights that drive action and growth.



STRIVE turned messy CRM data into
clean, consistent, decision-ready information.



Better data. Smarter decisions. Stronger business.





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CASE STUDY

Business Outcomes

Results demonstrated by this illustrative project

01



Better data accuracy

Duplicate removal and validation improved the accuracy of core records.

02



Cleaner reporting reliability

Consistent data produced trustworthy reports and clearer business insights.

03



Faster team follow-up

Up-to-date and organized records helped the team respond more quickly.

04



More organized contact records

Standardized fields and structured data made records easier to find and manage.

05



Improved CRM usability

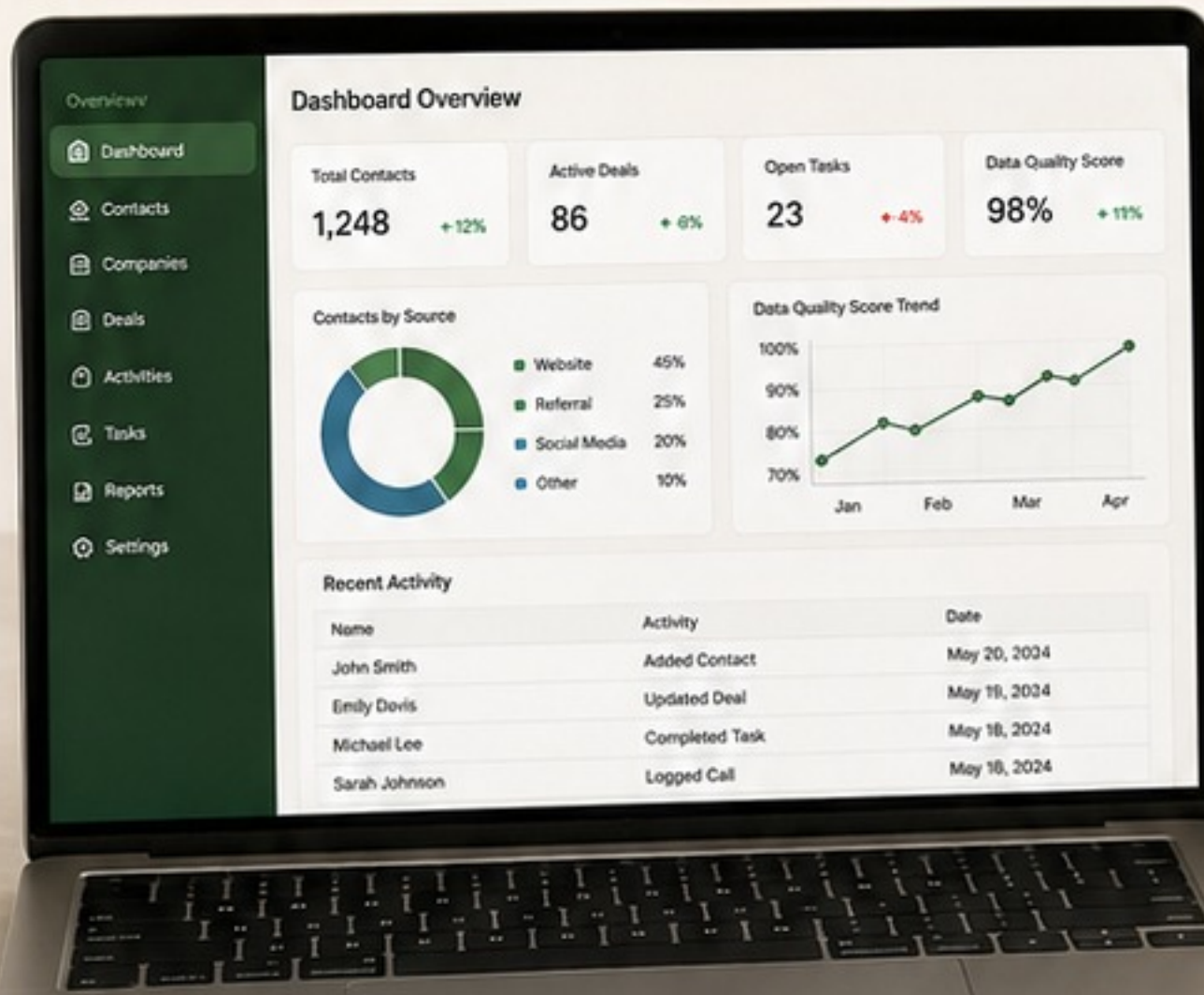
A cleaner system reduced confusion and improved day-to-day efficiency.

06



Stronger operational confidence

Reliable data and consistent processes supported better decisions and sustainable growth.



Verified client feedback will be added after publication approval. No placeholder testimonial is used.



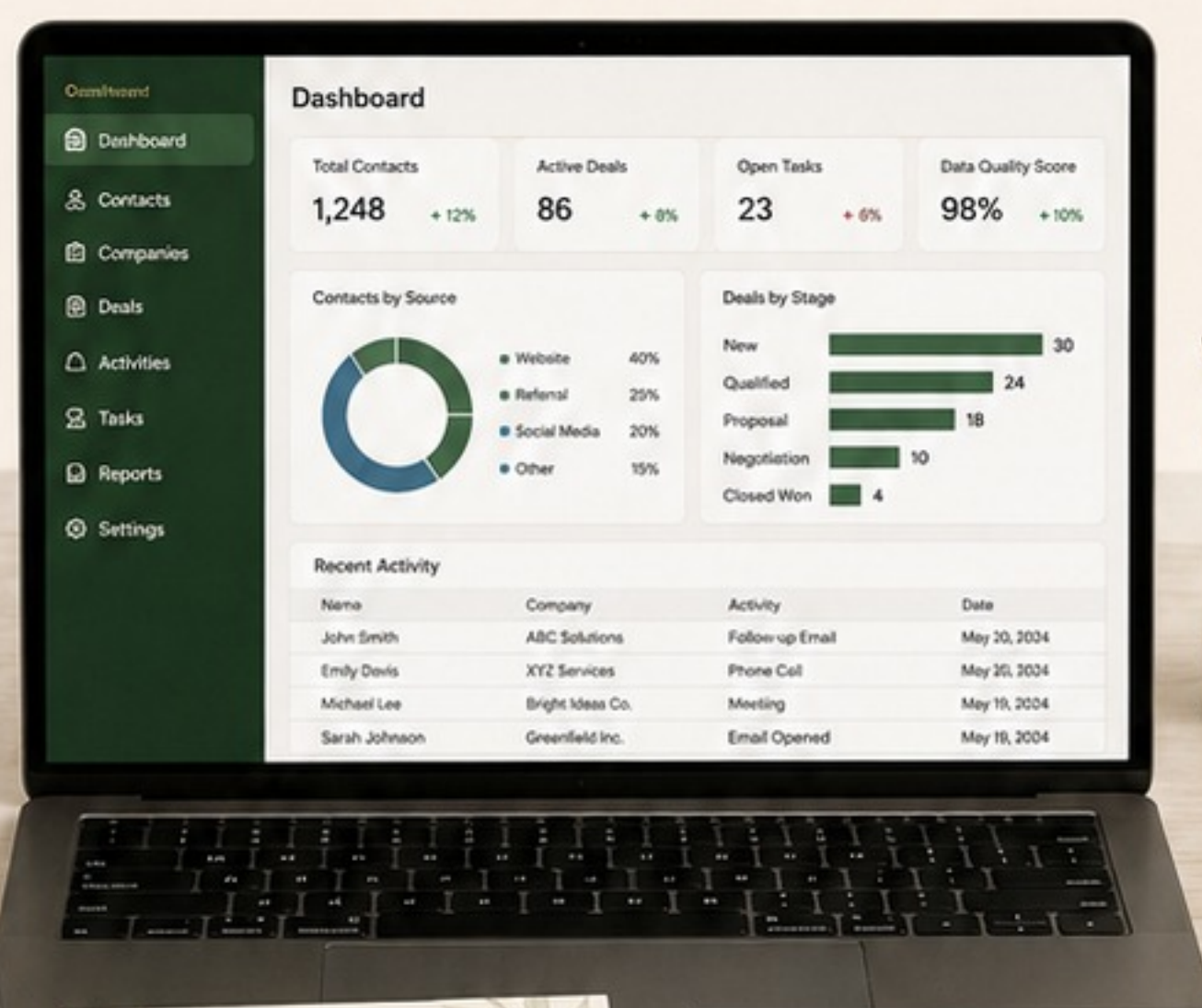
Illustrative sample for portfolio presentation. Client details have been changed for privacy.

Need a Similar Solution?

Let's build a cleaner CRM system for your business

At STRIVE, we help businesses bring clarity and control to their customer data. From CRM organization and data quality improvement to reporting clarity and follow-up efficiency — we build systems that support smarter decisions and sustainable growth.

“
Verified client feedback
will be added after
publication approval.
No placeholder
testimonial is used.”



CRM CLEANUP REPORT

OVERVIEW

Clean, structured, and optimized data ready to drive growth.

Total Contacts	1,248
Duplicates Removed	156
Fields Standardized	28
Missing Values Filled	312
Data Quality Score	98%

CRM FIELD GUIDE

GLOSSARY & STANDARDS

- Field Definitions
- Naming Conventions
- Data Standards
- Best Practices
- Usage Guidelines

CLEANUP SUMMARY

Contacts Cleaned	1,248
Duplicates Removed	156
Fields Standardized	28
Missing Values Filled	312
Records Updated	1,092
Data Quality Score	98%

Cleaner data. Better results.

HOW WE WORK WITH YOU



1

Share your current CRM or data problem



2

We assess and recommend the right cleanup workflow



3

Focus on your business while we build the system

START YOUR PROJECT →

REQUEST CUSTOM QUOTE →

Your Goals. Our Support. Great Results.

