

DATA AUDIT CHECKLIST

Complete this before building any segments or personalization flows. Scattered data produces misfired messaging. This tells you what you have, what's missing, and what to fix first.

Campaign/Initiative:

Owner:

Date completed:

Section 1: Core Systems

These three need to be connected before anything else matters. Any unchecked row is a segmentation risk. Resolve before moving on.

System	Connected?	Last synced	Known issues
CRM	<input type="checkbox"/> Yes <input type="checkbox"/> No		
Marketing automation	<input type="checkbox"/> Yes <input type="checkbox"/> No		
Website analytics	<input type="checkbox"/> Yes <input type="checkbox"/> No		

Section 2: CRM Field Health

Fields below 80% population aren't reliable for segmentation. Check each one.

Field	% populated	Usable?	Action
Job title	[%]	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Enrich <input type="checkbox"/> Clean <input type="checkbox"/> Drop
Company size	[%]	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Enrich <input type="checkbox"/> Clean <input type="checkbox"/> Drop
Industry	[%]	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Enrich <input type="checkbox"/> Clean <input type="checkbox"/> Drop
Lead source	[%]	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Enrich <input type="checkbox"/> Clean <input type="checkbox"/> Drop
Last activity date	[%]	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Enrich <input type="checkbox"/> Clean <input type="checkbox"/> Drop
Lifecycle stage	[%]	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Enrich <input type="checkbox"/> Clean <input type="checkbox"/> Drop
[Custom field]	[%]	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Enrich <input type="checkbox"/> Clean <input type="checkbox"/> Drop

Section 3: Behavioral Signals

Behavior-based segments only work if the signals are actually being tracked and routed correctly. Tracked but not feeding segments means the data exists and isn't being used. Flag those rows.

Signal	Tracked?	Where it lives	Feeding segments?
Pricing page visits	<input type="checkbox"/> Yes <input type="checkbox"/> No		<input type="checkbox"/> Yes <input type="checkbox"/> No
Email opens	<input type="checkbox"/> Yes <input type="checkbox"/> No		<input type="checkbox"/> Yes <input type="checkbox"/> No
Email clicks	<input type="checkbox"/> Yes <input type="checkbox"/> No		<input type="checkbox"/> Yes <input type="checkbox"/> No
Content downloads	<input type="checkbox"/> Yes <input type="checkbox"/> No		<input type="checkbox"/> Yes <input type="checkbox"/> No
Demo or trial requests	<input type="checkbox"/> Yes <input type="checkbox"/> No		<input type="checkbox"/> Yes <input type="checkbox"/> No
Repeat site visits	<input type="checkbox"/> Yes <input type="checkbox"/> No		<input type="checkbox"/> Yes <input type="checkbox"/> No
Inactivity window	<input type="checkbox"/> Yes <input type="checkbox"/> No		<input type="checkbox"/> Yes <input type="checkbox"/> No
[Custom signal]	<input type="checkbox"/> Yes <input type="checkbox"/> No		<input type="checkbox"/> Yes <input type="checkbox"/> No

Section 4: Gaps and Fixes

Gap	Impact if ignored	Fix needed	Owner	Due
[Example: company size only 40% populated]	[Firmographic segments unreliable]	[Enrich or remove from logic]	[Name]	[Date]
[Gap 2]				
[Gap 3]				

Before you build, confirm:

If any row is unchecked, your segments will need manual correction after launch. That's a tradeoff worth making consciously, not discovering mid-campaign.

	Ready?
Core systems connected and syncing	<input type="checkbox"/> Yes <input type="checkbox"/> No
CRM fields above 80% for planned segmentation criteria	<input type="checkbox"/> Yes <input type="checkbox"/> No

Behavioral signals tracked and routing into segments	<input type="checkbox"/> Yes <input type="checkbox"/> No
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