

CRM Spring Cleaning Checklist

- Schedule a consultation with your Andar representative
- Merge duplicates
- Purge inactive records that are no longer useful
- Spot-check records for accuracy and completeness
- Run NCOA update and other data enhancements
- Audit customization and campaign structures for alignment with current programs and practices
- Check on staff training needs
- Update internal guidelines, handbook, and/or training materials
- Test integrations and troubleshoot any problems
- Update online and paper forms
- Check acknowledgement workflows
- Review and update user permissions
- Update dashboards and retire unused reports