# The CRM data enrichment audit, in 25 checks.

Enrichment fills in what a record is missing: company size, industry, country, role, the tools a company runs. Routing, scoring, reporting and every AI tool you add later act on those fields with full confidence, whether the values are right or not. This checklist tells you whether yours can be trusted. It works for HubSpot, Salesforce or any other CRM, and for any data provider.

**1**
**Work with the CRM open**
Tick a box only when you can point to the field, rule or report that proves it.

**2**
**Fill the field map**
Page 3 has one row for each core field: who reads it, where it comes from, who owns it.

**3**
**Fix in the order given**
Page 3 says which unticked boxes to close first, and which can wait.

PART 1 OF 5

## Fields: enrich only what something reads

Forty enriched fields that nobody reads add cost and noise, and make it harder to see which values can be trusted.

- [ ] 01 Every enriched field is read by a **routing rule, a score or a report**, and you can name which one.
- [ ] 02 The core five are covered: **company size, industry, country, role and seniority, main tools in use**.
- [ ] 03 Each field has one written definition. Company size, for example, is employees or revenue, never both, with fixed bands.
- [ ] 04 Fields that drive rules are **picklists with fixed values**, not free text that a rule has to guess at.
- [ ] 05 Enrichment is switched off for fields nothing reads, so you do not pay for them or mistake them for verified data.

PART 2 OF 5

## Timing: before the first decision, then on a schedule

A record enriched once and never again slowly becomes a confident description of the past.

- [ ] 06 Enrichment runs **when a record is created**, before routing and scoring, so the first decision uses complete data.
- [ ] 07 A lead that cannot be enriched **still gets an owner** through a fallback route. It does not wait in a queue for data.
- [ ] 08 Account fields are refreshed on a schedule you can state, such as every few months.
- [ ] 09 Every contact carries a **last verified date** for job title, email and phone.
- [ ] 10 Contacts not verified within one sales cycle are re-verified **before they enter a sequence**.

PART 3 OF 5

## Rules: the ones that prevent damage

Enrichment without rules overwrites good data with worse data, and nobody notices until a report stops making sense.

- [ ] 11 Each data source is **mapped to specific fields**. No source writes wherever it likes.
- [ ] 12 The **source and the date** are stored beside every enriched value.
- [ ] 13 A written rule says **which source wins** when two disagree.
- [ ] 14 A value a person typed in is **never overwritten**. They usually know something the database does not.
- [ ] 15 New records are **matched to existing accounts first**, so enrichment does not create duplicates.

PART 4 OF 5

## Provider: judged on your own records

Providers vary a great deal by region and company size. Accuracy on your segment matters more than the size of the database.

- [ ] 16 The provider was tested on **a sample of accounts you know well**, not on a demo list.
- [ ] 17 Coverage was measured for **your region and your company-size segment** specifically.
- [ ] 18 Accuracy was checked **field by field** against the truth, not as one overall match rate.
- [ ] 19 If several sources run in a waterfall, **the order and the pass rules are written down**, so anyone can explain where a value came from.
- [ ] 20 You know what one enriched record costs, and which records you pay for more than once.

PART 5 OF 5

## AI readiness: what acts on these fields

A model trained on stale or guessed fields learns the wrong pattern, and an AI SDR writes to the wrong person in the wrong role.

- [ ] 21 Every input to a scoring model is an enriched or verified field **with a date**.
- [ ] 22 Routing and scoring have a **tested path for blank values**. A blank never silently counts as a zero or a "no".
- [ ] 23 Sequences and AI SDR tools read the **verified role**, and skip contacts whose role is unverified.
- [ ] 24 **One named person** owns enrichment: the rules, the provider and the budget.
- [ ] 25 Fill rate and age, field by field, sit on a report that someone **reads every month**.

# Your field map, one row per core field.

Fill this in before you buy, renew or switch a provider. A field with an empty "Read by" box should not be enriched. A field with an empty "Owner" box will drift.

| FIELD | READ BY (RULE, SCORE, REPORT) | SOURCE THAT WINS | REFRESHED | OWNER |
|---|---|---|---|---|
| Company size | | | | |
| Industry | | | | |
| Country | | | | |
| Role and seniority | | | | |
| Main tools in use | | | | |
| Your field | | | | |
| Your field | | | | |

WHAT TO FIX FIRST

## The order we work in

1. **Parts 2 and 3.** Timing and rules decide whether enrichment helps or harms. An unticked box here is worth closing before you spend more on data.
2. **Part 1.** Cut the field list to what something reads. It lowers cost at once.
3. **Part 4.** Test the provider only after the rules exist, or the test measures your mess, not their data.
4. **Part 5.** Close these before any scoring model or AI SDR goes live.

This order is our working practice, not an industry benchmark.

GO FURTHER, FREE

## Related reading and tools

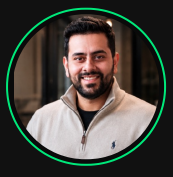
What CRM data enrichment is, and how it should work

How to prepare CRM data for AI

The week-one CRM data audit

GTM leak detector: six questions, about a minute.

Want a second pair of eyes on your field map? Write to hello@zrev.ai.



WRITTEN BY

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zRev AI builds AI into the sales and marketing systems B2B software companies already run, inside their own HubSpot or Salesforce. Shivil spent a decade in M&A integration, global operations and FP&A before founding it.

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