The CRM enrichment field map, worked and blank.

One row per enriched field, and the same questions on every row: who reads it, what it means, which source wins and how often it is refreshed. This page is the map filled in as a worked example. Page 2 is the same map, blank, for your own CRM. It works for HubSpot, Salesforce or any other CRM, and for any data provider.

1

List what enrichment writes

Open the CRM and write down every field an enrichment tool fills in today.

2

Name the reader

Beside each field, name the rule, score or report that reads it. No reader, no row: switch enrichment off for it.

3

Fill the rest

Meaning, the source that wins, the refresh and an owner. The gaps you find are the work.

WORKED EXAMPLE · SEVEN ROWS COVER MOST B2B TEAMS

FIELD	READ BY	MEANS	SOURCE THAT WINS	REFRESHED
Company size	Routing by segment, scoring, territory planning	Employees, in fixed bands. Never mixed with revenue	Company data provider. For customers, what they told you	Every few months
Industry	Scoring, segment reports, choice of message	A short picklist of your own, with provider categories mapped onto it	Company data provider, mapped on the way in	With the account refresh
Country	Territory routing, contact rules, response hours	Two fields: where the account is based, and where the person works	The form first, then a provider. A network guess comes last	With the account refresh
Role and seniority	Scoring, sequence choice, buying group map	Function and level as picklists, plus the raw job title	The form and a contact data provider	Whenever last verified is stale
Tools in use	Scoring, routing to a specialist, first message	One picklist per category that matters, such as CRM	Technology data provider, then the first conversation	Every few months
Email and phone	Sequences, the dialer, sender reputation	Verified work email. Phone stored with its type	Contact providers in a fixed order (a waterfall)	Before a contact enters a sequence
Last verified date	The rule that lets a record be sequenced or scored	The date something confirmed this person still holds this role	The enrichment run that checked, or a rep who heard it	Never by itself. That is the point

RULE ONE

Source and date, beside every value

Without them nobody can explain where a value came from, and nobody can tell a fresh value from an old one.

RULE TWO

A typed value is never overwritten

A person usually knows something the database does not. When two sources disagree, the map says which one wins for that field.

Your field map, to fill in.

A field with an empty "Read by" box should not be enriched. A field with an empty "Owner" box will drift. Seven is a ceiling to start from, not a target: if routing reads only two fields today, enrich those two properly.

FIELD	READ BY	MEANS	SOURCE THAT WINS	REFRESHED	OWNER
Company size					
Industry					
Country					
Role and seniority					
Tools in use					
Email and phone					
Last verified date					
Your field					
Your field					

WHAT EACH ROW USUALLY HIDES

Seven mistakes to look for

Company size. Two sources with different band edges. A parent's headcount on a subsidiary.

Industry. The provider's full taxonomy copied in. Or one category that fits everyone.

Country. One field doing both jobs, so a buyer is routed to the wrong time zone.

Role and seniority. A title matched on one word: an assistant scored as a vice president.

Tools in use. A detected tool treated as a fact long after the contract ended.

Email and phone. A catch-all address marked valid. A switchboard stored as a direct line.

Last verified date. Stamped whenever the record is touched, so stale contacts pass.

GO FURTHER, FREE

Related reading and tools

CRM data enrichment, field by field: the article behind this map.

The CRM data enrichment audit: 25 checks to run alongside it.

What waterfall enrichment is, and when you need one.

What CRM data enrichment is, and how it should work.

The same map as a spreadsheet: zrev.ai/downloads/crm-enrichment-field-map.csv

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

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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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