



Suhas Bhairav

AI CRM Data Quality Checklist

A practical checklist to detect and fix CRM data quality gaps.

A practical, weekly-action checklist to improve CRM data quality with AI-assisted workflows.

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Detect, Clean, and Forecast

This page outlines the scope: automate data hygiene, deduplication, and forecast validation in CRM. It aligns AI tooling with sales workflows and governance.

Key move Start with a 2-week data quality sprint; document decisions and owners.

PRACTICAL CHECKLIST

- 01** Define core CRM domains: Contacts, Accounts, Opportunities, Activities, and Next Steps.
- 02** Automate duplicate detection and merge suggestions nightly, with human override for merges.
- 03** Auto-fill missing fields where confidence is high; escalate low-confidence gaps for review.
- 04** Enforce consistent stage names and required next steps via data rules.
- 05** Track data provenance and last updated timestamps for auditability.
- 06** CRM admin is data steward; sales leads own accounts.
- 07** Prepare for AI-assisted suggestions but require human sign-off on critical changes.

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What to Automate vs Review

Automation handles routine cleaning and rule enforcement. Complex judgments remain in human review.

Key move Keep human review for high-impact fields and deals.

PRACTICAL CHECKLIST

- 01** Nightly duplicate checks across Contacts and Accounts with auto-merge only on high-confidence signals.
- 02** Auto-fill missing fields (email, phone, company size) when confidence exceeds threshold.
- 03** Flag incomplete records (missing email/phone) for targeted sales ops review.
- 04** Standardize stage names and enforce required next steps via data rules.
- 05** Forecast fields validated; auto-suggested values flagged for validation when low confidence.
- 06** Audit trails capture rule changes, owners, and timing for compliance.
- 07** Tools needed: CRM validation rules, API scripts, and optional AI agent for suggestions.

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Practical Weekly Adoption Plan

Incremental adoption reduces risk and accelerates ROI. Follow a 6-week weekly plan with measurable milestones.

Key move Document decisions; keep owners accountable; no auto-changes without sign-off.

PRACTICAL CHECKLIST

- 01** Week 1: define data owners, quality rules, and success metrics.
- 02** Week 2: implement duplicate detection, alerting, and auto-merge safety.
- 03** Week 3: enable high-confidence auto-fill and low-confidence review queue.
- 04** Week 4: enforce stage-name standards and next-step validation rules.
- 05** Week 5: pilot with small sales team, collect KPI data.
- 06** Week 6: review outcomes, adjust thresholds, publish governance doc.
- 07** Ongoing: establish a quarterly audit and data quality scorecard.

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ABOUT THE CREATOR

Suhas Bhairav

I build AI systems that combine distributed architecture, retrieval, knowledge graphs, security, and practical workflow design. My focus is AI that can be used repeatedly by real teams: understandable, reliable, and grounded in the work people already do.

EXPERTISE

- Principal systems architecture and applied AI engineering
- Production-grade AI systems, agentic workflows, RAG, and knowledge graphs
- Full-stack workflow applications across AWS, Google Cloud, Azure, on-premise, and hybrid environments
- Practical AI implementation patterns for automotive, manufacturing, finance, logistics, cybersecurity, sales, and customer operations
- Security, governance, observability, approvals, and failure-mode thinking for operational AI systems

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