



The Best Practices for Managing Your Database:

A Checklist



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Introduction



The data you collect is valuable, so you need to make sure you're doing all you can to keep it organised, relevant, and (ultimately) *useful* for your entire business.

The best way to do this is with a digital database, so if you haven't already, it's high past time to modernise your business by going paperless (as much as possible).

Job management software is a great way to get started managing your data, but when you do "go digital", there are Best Practices you'll need to follow to ensure things stay organised.

Keeping these points in check will help to ensure you're making the most of the information you use, which is why we've put together this checklist. Not only that, but it'll have a positive impact on your customer relationships, staff productivity, and overall output of your business.



Understand the different types of data

Before we dive into the main checklist, it's useful to ask the following question:

Do you know what data is a priority for your business to collect?



After all, it's important to make sure you're not overwhelmed by non-essential information, which means taking the time to figure out:

- What information is critical for your business
- What information is good to have
- What information is irrelevant

One way to help with this is to differentiate between Transactional and Master Data.

Transactional Data



Transactional Data is information resulting from a financial exchange.

It's usually represented numerically, with typical examples including financial records (like invoices and estimates), or even the amount of time an engineer spends on a job.

These pieces of information are critical and should be a priority to keep organised. Besides: incorrect financial data will quite literally be costing your business money.

Logistical and travel data are other forms of useful transactional data that are good to have, particularly when it comes to scheduling diaries and booking appointments.



Master Data



Master Data helps to identify your customers and prospects.

This data doesn't change often, but you're likely going to collect more of it as the number of customers you work with goes up. If you're keeping data tidy, you won't have a problem.

Master Data is based on what's often considered "concrete" data, and includes a customer's:

- Name
- Address/es
- Contact information (email, phone number/s, etc.)
- Installed assets, like appliances or hardware that you manage for them

This sort of data is critical, (as is the asset/appliance location). After all, you don't want to send engineers to the wrong address, or risk invoicing the wrong customer!

Tip:

Any information that isn't Transactional or Master Data can likely be deemed **irrelevant**. After all, you don't need to know a customer's personal info (like religion or orientation), so make sure to focus only on what's absolutely necessary to help you get the job done.



The Checklist of Best Practices

When it comes to best practices, there's a lot you can do to keep your data squeaky clean!

Don't worry, it needn't be a lengthy process: following best practices is all about saving you time, not taking up more of it.

While there may be an initial adjustment if it's still early days for your digital database, once it's up and running and your staff have developed good habits, you'll see the benefits.



Use the checklist below to tick off the practices you have followed, and consider the additional tips you can put to use to help make improvements as-and-when necessary.

As we mentioned above, figuring out what data is essential is step one, so let's start there:

1

Do we know what data is essential to our business?

Yes No

Tip: Transactional and Master Data are great for figuring this out, but if you know what your broader business goals are they can inform what data you'll find useful to collect and store.

No plan? Get to it!

Speak to your leadership team and figure out your business goals. Is it growth, new services, more customer reviews? Discuss and have a think about what data will help you achieve these goals.

2

Are we regularly "cleaning" our data i.e. removing duplicated or out-of-date files?

Yes No

Tip: A good database should be accessible across multiple devices via cloud storage. If yours isn't, it's worth considering using a database that lets you synchronise data via the cloud so that it's updated for everyone, automatically. This can help reduce the need to manually search for and remove duplicated data: it also makes updating information easier.

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3

Is our data easily accessible to the relevant staff who need it?

Yes No

Have you set levels of accessibility? (i.e. not all employees need access to customer payment info). Getting this organised can be the responsibility of a manager who's in charge of overseeing your database. In addition, consider how accessible your data is i.e. can you view it on a mobile device, out in the field, or is it only accessible in the office?

A few additional tips for staff to follow:

- Have your office staff ask simple questions to clarify a customer's correct contact information
- Use the same format for addresses at all times (including postcode)
- Insert names in the correct fields and use capital letters and numbers correctly. (Attention to detail is important, as a misspelling can create duplicate data-entry, which leads to errors)
- Ask your team a few times a year to report on whether the database is still working as intended: user feedback can act as a "database health-check".

4

Is our data backed up and are those back-ups secure?

Yes No

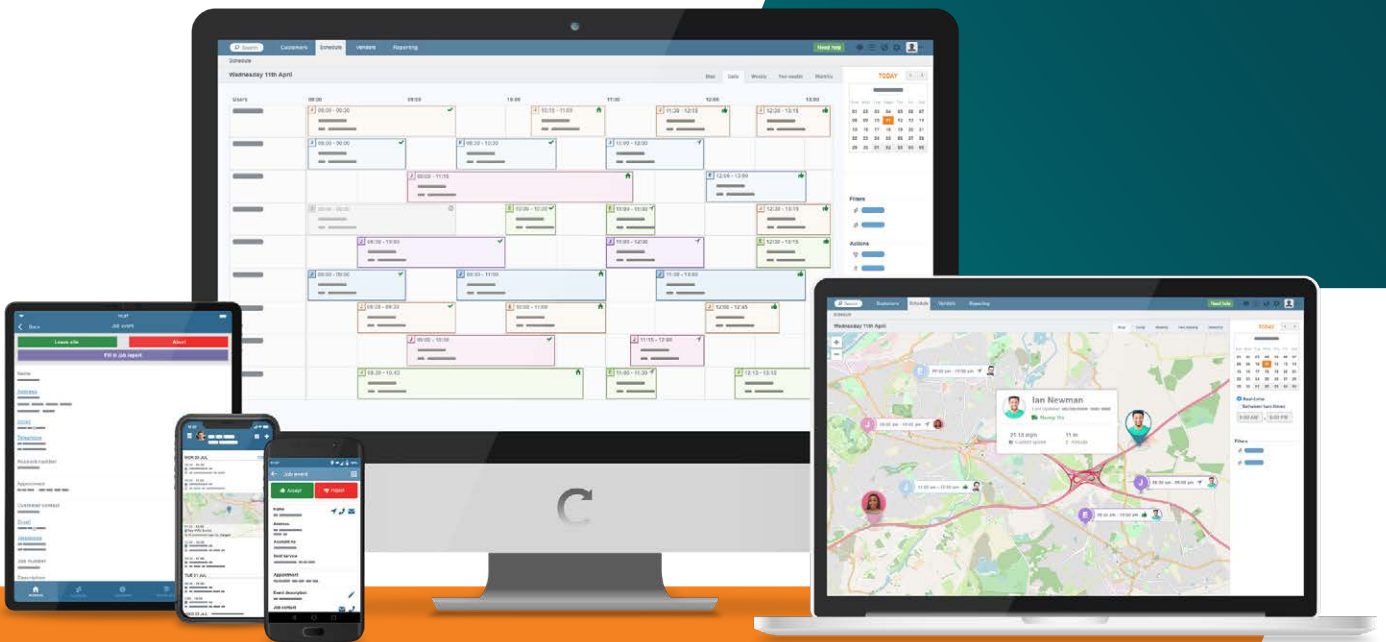
All that data's going to be of little use if it's not backed up, or available if you have to work offline. After all, while network outages aren't too common, they do happen, and you don't want to risk losing access to important data (even temporarily) which can stop your business from functioning.

Cloud storage back-up is essential (Google, OneDrive, or DropBox are great solutions), though it doesn't hurt to have physical backups either. However, **don't** rely on these alone, as they can degrade over time and be damaged: this is why a digitalised solution is best.

A Final Point

Your database should be a trustworthy place that you can rely on to house your customer information. This leads to more productive working relationships and consistent data entry practices will help ensure that happens. It may sound obvious, but a simple solution is often the best!





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