

Sync and Data Hygiene Audit

TRIAGE Find and fix what is broken in your data.

The first fix, because the data is the floor. Work off your data flow map. This finds where reality and the map disagree, ranks it, and puts in the guardrail so it does not come back. Fixing a thing once without a guardrail means fixing it again next quarter.

Sync checks. Run on each flow. Check what holds.

- ☐ The sync behaves the way the map documents it, not some other way.
- ☐ A conflict rule exists and holds. The right side wins every time.
- ☐ No silent failures. Failed syncs are visible and handled, not piling up in a log no one reads.
- ☐ Nothing overwrites good data with blanks or defaults.
- ☐ Timing is understood. You know whether each flow is real-time or scheduled, and the lag is acceptable.

Data hygiene checks.

- ☐ Duplicates are the exception, and you know the merge rules.
- ☐ The fields routing, scoring, and reporting depend on are populated.
- ☐ The same field means the same thing everywhere and is filled the same way by every team.
- ☐ Old records are aged out or marked.
- ☐ Validation exists on the fields that matter.

Rank what you find.

Severity	Meaning	When to fix
Breaks reporting	Numbers leadership or finance act on are wrong	First
Breaks routing or scoring	Leads go to the wrong place or wrong priority	Next
Cosmetic	Real but low stakes	When you reach it

Fix, then prevent. For each problem, install the guardrail.

Problem	Guardrail
A field gets overwritten	Set and enforce the conflict rule; the source of truth wins
Duplicates	Dedup rules plus a merge policy, not a one-time cleanup
Missing required fields	Validation or required-field rules at entry
The same field means two things	One documented definition, and picklists instead of free text
Silent sync failures	An alert or standing check on the sync error log

Done when every flow behaves as the map says, two-way flows have an enforced conflict rule, duplicates are the exception, the important fields are populated and mean one thing, and you would put these numbers in front of finance.