

The CRM Enrichment Audit 2026

Score your CRM data quality across 5 critical dimensions. Find out if your pipeline is running on clean fuel — or poisoning your revenue with bad data.

Data Completeness

Contact Accuracy

Segmentation Depth

Enrichment Coverage

CRM Hygiene



WHY CRM DATA FAILS

Most CRMs Are Revenue Traps in Disguise

B2B marketers invest heavily in CRM platforms — HubSpot, Salesforce, Zoho — expecting them to become growth engines. Instead, most CRMs quietly accumulate bad data that poisons targeting, inflates pipelines, and makes personalization impossible.

The problem is not the platform. It is the data inside it.

THE HIDDEN COST

Poor data quality costs companies \$12.9M annually on average, according to Gartner. For B2B marketing teams, bad CRM data directly translates into wasted ad spend, low email deliverability, missed segments, and deals lost to silence.

CRM DATA DECAY REALITY

Contacts with missing job title



Emails bouncing or outdated



Records missing company size / revenue



Duplicate contacts distorting reports



A well-enriched CRM is the foundation of every high-performing demand generation program. Without it, **segmentation is guesswork, personalization is theater, and attribution is fiction.**

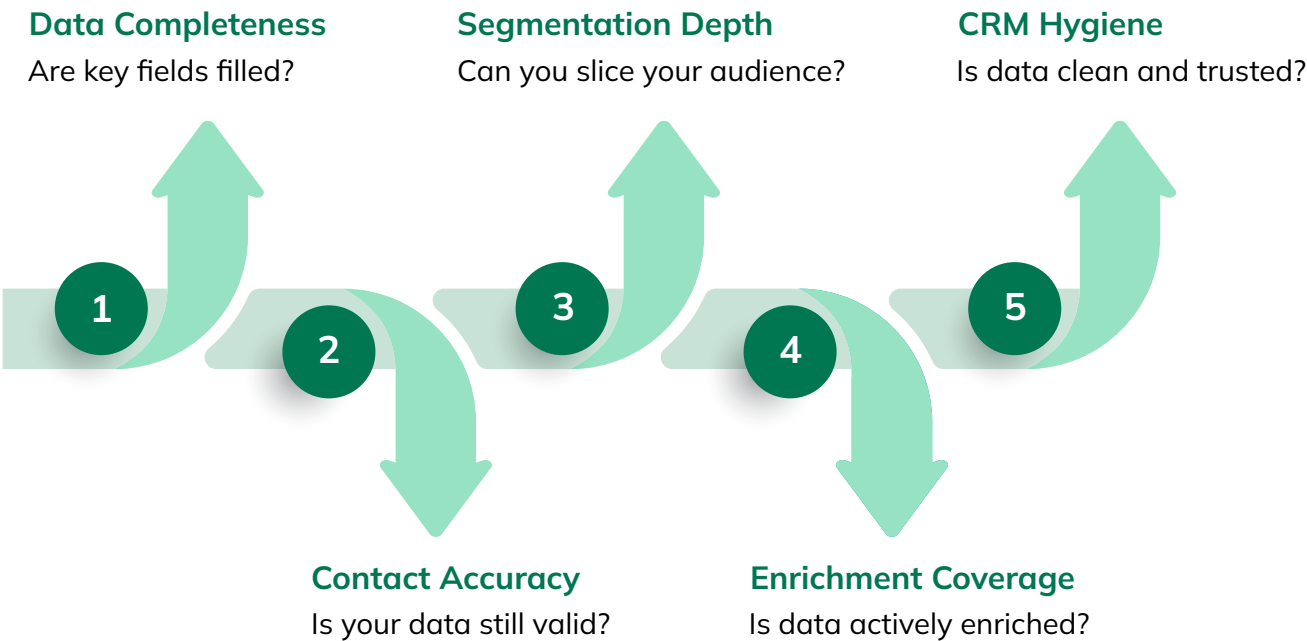
HOW TO USE THIS AUDIT

Score Each Question 0 to 2

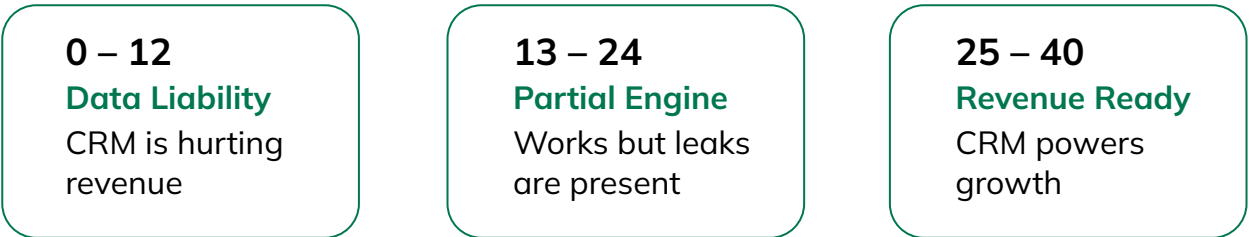
This audit focuses on five critical dimensions of CRM data health. Each question is scored from 0 to 2 based on the current state of your CRM.



5 AUDIT DIMENSIONS



SCORE INTERPRETATION



DIMENSION 01

Data Completeness

Incomplete records are the #1 reason B2B campaigns underperform. A contact without a job title cannot be targeted. A record without company size cannot be scored. Missing fields don't just limit segmentation — they silently kill personalization at scale.

WHY IT MATTERS

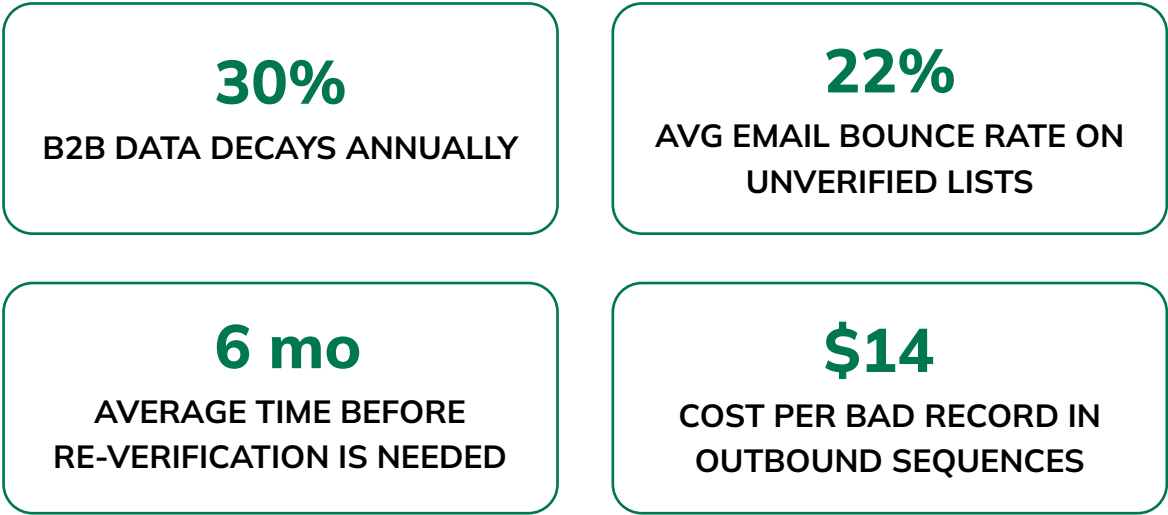
Studies show that **42% of B2B marketers cite poor data quality as their top challenge** in executing demand generation campaigns. The most common culprit: incomplete CRM records that prevent proper segmentation and lead scoring.

Audit Point	Question	Business Impact	Score
Job Title / Role	Do contacts have verified job titles and seniority levels?	Without role data, persona targeting and lead scoring are impossible	0–2
Company Firmographics	Are company size, industry, and revenue range captured?	Missing firmographics prevent ICP filtering and territory assignment	0–2
Direct Contact Info	Do records include direct email and phone (not generic)?	Generic contacts reduce deliverability and connection rates	0–2
Geography & Timezone	Is location data complete for geo-targeted campaigns?	Poor geo data breaks regional campaigns and timezone-based sends	0–2

DIMENSION 02

Contact Accuracy

B2B data decays at roughly 30% per year. Job changes, company mergers, promotions, and email domain shifts render even recently acquired data unreliable. A contact database that isn't actively verified is a liability dressed as an asset.



Audit Point	Question	Business Impact	Score
Email Validity	Are email addresses verified and bounce-tested regularly?	High bounce rates trigger spam filters, destroying sender reputation	0-2
Job Change Tracking	Is the system updated when contacts change roles or companies?	Messaging the wrong person wastes budget and damages brand perception	0-2
Phone Verification	Are phone numbers direct-dial verified (not switchboard)?	Generic numbers reduce SDR connect rates by up to 70%	0-2
Re-verification Cadence	Is data re-verified on a scheduled cycle (quarterly or bi-annual)?	Without a cadence, decay compounds silently quarter over quarter	0-2

DIMENSION 03

Segmentation Depth

The quality of your CRM segmentation determines the relevance of every campaign you run. Marketers with deep segmentation data achieve 3–5x higher email open rates and 2x better MQL-to-SQL conversion — not because they send more, but because they send smarter.

THE PERSONALIZATION GAP

Close to **50% of B2B marketers limit personalization to A/B testing subject lines** — because their CRM doesn't have the data required for deeper segmentation. Intent data, technographics, and behavioral signals are the next frontier.

Audit Point	Question	Business Impact	Score
ICP Tagging	Are contacts tagged against your Ideal Customer Profile criteria?	Without ICP tags, campaigns reach the wrong audience	0–2
Technographic Data	Do you know what tools and platforms your prospects use?	Tech stack data enables hyper-relevant outreach and competitive displacement	0–2
Buying Stage Signals	Are contacts scored by engagement and intent signals?	Without intent scoring, sales pursues cold leads while hot ones go untouched	0–2
Behavioral History	Is web activity, email engagement, and event attendance tracked per contact?	Behavior data is the richest signal for predicting conversion readiness	0–2

DIMENSION 04

Enrichment Coverage

Data enrichment is the process of augmenting existing CRM records with external intelligence — filling the gaps that lead forms never capture. Without active enrichment, your CRM contains only what prospects chose to tell you, which is rarely enough to run a precision campaign.

ENRICHMENT IMPACT

Organizations that implement continuous CRM enrichment programs see on average a **47% improvement in email campaign ROI** and a **33% reduction in cost-per-qualified-lead** within the first 6 months.

Audit Point	Question	Business Impact	Score
Third-Party Enrichment	Are new contacts automatically enriched via a data provider on entry?	Manual enrichment misses 80%+ of records and can't scale	0–2
Email Append	Can you append verified emails to contacts that only have phone or LinkedIn?	Email append expands your reachable audience by 30–60%	0–2
Social & Digital Signals	Are LinkedIn activity, funding events, and hiring signals tracked?	Trigger events (funding, hiring, tech change) are the highest-converting outreach moments	0–2
Historical Recor Enrichment	Have existing legacy contacts been retroactively enriched?	Legacy records often represent the highest-value contacts but are the least enriched	0–2

DIMENSION 05

CRM Hygiene

Even the most enriched CRM becomes a liability when basic hygiene breaks down. Duplicate records distort attribution. Outdated opt-out statuses create compliance risk. Inconsistent naming conventions destroy segmentation logic. Hygiene is the infrastructure that makes enrichment worthwhile.

Audit Point	Question	Business Impact	Score
Duplicate Management	Are duplicate contacts automatically detected and merged?	Duplicates inflate pipeline metrics and cause multiple outreach sequences to hit the same contact	0–2
Opt-Out Compliance	Are unsubscribes, DNC flags, and GDPR/CCPA preferences respected and synced across tools?	Compliance failures expose companies to fines and irreparable brand damage	0–2
Data Standardization	Are field values consistent? (e.g., "VP Sales" vs "VP of Sales" vs "VP, Sales")	Inconsistent values break segment filters and list exports	0–2
Inactive Record Archiving	Are cold or inactive contacts flagged, archived, or suppressed from active campaigns?	Mailing inactive contacts degrades sender reputation and inflates cost per email	0–2

INTERPRETING YOUR SCORE

What Your CRM Score Really Means

Your total score across 20 questions (0–40) reveals the true health of your CRM as a demand generation asset. Most B2B teams discover they are operating in the "Partial Engine" zone — which means enrichment gaps are silently limiting their best campaigns.

Score Range	Status	What It Means	Recommended Action
0–12	Data Liability	CRM is actively damaging campaigns, attribution, and pipeline accuracy	Immediate CRM data audit and emergency enrichment program
13–24	Partial Engine	Functional but leaking. Gaps are costing you MQLs you'll never see	Structured enrichment roadmap targeting highest-impact dimensions first
25–40	Revenue Ready	CRM is a precision demand gen asset. Focus on expanding intent coverage	Advance to intent-driven enrichment and predictive scoring programs

THE DATA REALITY

In our experience auditing B2B CRM systems across industries, **fewer than 15% of marketing teams score above 28**. Most operate with a "Partial Engine" — which means they are spending full campaign budgets on a fractured data foundation.

NEXT STEP

If This Audit Revealed Gaps, the Data Is Fixable.

The problem is not your CRM platform. It is the data structure inside it. Most enrichment gaps can be resolved in 30 days with the right data partner and a clear remediation plan.

Book Your Free CRM Data Audit Call with Span Global

In a 30-minute call, our data specialists will review your CRM health, identify your highest-impact enrichment gaps, and map a clear 90-day remediation plan.



Review your current
data completeness and
accuracy scores



Identify which enrichment
gaps are costing you the
most pipeline



Map the exact fields
and sources needed
to fix your CRM



Build a 90-day CRM
enrichment roadmap with
clear ROI metrics

BOOK YOUR FREE CRM AUDIT CALL



SPAN
GLOBAL SERVICES
GLOBAL GROWTH PARTNER

2710, Media Center Dr, Bldg#6, Suite 120, Los Angeles, CA 90065

☎ 877) 755-0023 ✉ info@spanglobalservices.com 🌐 www.spanglobalservices.com