**Template: Adobe Marketo Engage Data Hygiene Process Documentation**

*Reference this template to document the critical elements for your organization.*

# Purpose and scope:

* **Purpose:** Explain the goals of the data hygiene policy, such as improving data accuracy and enhancing business operations.
* **Scope:** Define which teams and systems the policy applies to, including Marketo Engage, CRM and other relevant platforms.
* **Relevant links:**
  + **Data hygiene programs:** [Link to Data Hygiene Programs in Marketo Engage]
  + **Smart Campaigns:** [Link to Smart Campaigns in Marketo Engage]
  + **Reports:** [Link to Data Quality Reports in CRM]
  + **Data management tools:** [Link to Data Management Tools in CRM]

# Data entry guidelines:

* **Field requirements:** Specify which fields are mandatory and which are optional.
* **Data formats:** Provide guidelines for correct data formats (e.g., date, phone number, email).
* **Data validation:** Outline steps for validating data before entry.

# Data cleaning procedures:

* **Duplicate management:** Describe methods for identifying and handling duplicate records.
* **Inconsistent data handling:** Explain how to address data inconsistencies.
* **Data enrichment:** Detail the process for enriching data with additional information.

# Data quality metrics:

* **Key Performance Indicators (KPIs):** Define metrics to measure data quality.
* **Regular audits:** Schedule and document regular data audits.

# Data governance roles and responsibilities:

* **Data stewards:** Identify who is responsible for data quality oversight.
* **Team roles:** Clearly define the roles and responsibilities of each team involved in data entry and management.

# Training and onboarding:

* **Initial training:** Outline the initial training sessions for new team members.
* **Ongoing training:** Describe the frequency and format of ongoing training.

# Data security and privacy:

* **Compliance:** Ensure the policy complies with data protection regulations (e.g., GDPR, CCPA).
* **Access controls:** Define who has access to the data and the levels of access.
* **Data encryption:** Specify the use of encryption for sensitive data.

# Data integration and syncing:

* **Syncing frequency:** Only applicable to custom CRM integrations. Determine how often data should be synced. The native connector automatically syncs at intervals throughout the day.
* **Syncing rules:** Document the rules and conditions for syncing data.
* **Error handling:** Describe the process for Marketo Engage admin or CRM admin to handle sync errors.

# Tools and resources:

* **Software tools:** List the tools and resources used for data hygiene.
* **Training materials:** Provide links to training materials and user guides.

# Feedback and continuous improvement:

* **Feedback mechanism:** Establish a process for team members to provide feedback.
* **Policy updates:** Schedule regular reviews and updates to the policy.

# Example of relevant links

* **Data hygiene programs in Marketo Engage:** [Insert relevant link(s)]
* **Smart Campaigns in Marketo Engage:** [Insert relevant link(s)]
* **Data quality reports in CRM:** [Insert relevant link(s)]
* **Data Management tools in CRM:** [Insert relevant link(s)]