



FIELD GUIDE

**SUPPORTING CRM AND LEAD
DATA INTEGRITY**

TANTA GLOBAL ASSIST

WHAT THIS FIELD GUIDE IS FOR

CRM support focuses on accuracy and consistency so outreach, follow-up, and reporting remain reliable.

Why This Practice Matters in Client Work

Errors surface quickly and feel personal.

Poor data leads to:

- Missed outreach
- Duplicate contact
- Incorrect follow-up
- Damaged credibility

Clean systems protect execution quality.

Core Principles

- Accuracy beats speed
- Every field has meaning
- Changes must be intentional

Common Failure Patterns

- Guessing pipeline stages
- Editing without context
- Ignoring duplicates

Practical Approaches That Actually Work

- Confirm field definitions
- Flag uncertainty
- Standardize criteria

What This Practice Helps You Do

Maintain decision-ready sales data.



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