

Email Data Hygiene SOPs Workbook



Use this workbook as a framework to outline the standard operating procedures for keeping your data clean and aligned with strategic goals. You will identify data sources, accountable partners, and audit cadence.



Section 1: Introduction/Summary

In this section, summarize your overall data goals and purpose of your email data maintenance process

Section 2: Accountability

In this section, answer the following questions to outline who is responsible for maintaining the data

Function	Team or Individual	Responsibilities
Data Performance Does data meet goals or objectives?		
Data Integrity Is data accurate and up to date?		
Data Analysis & Insight What insights can be drawn from data?		
Data Operations How is data organized and accessed?		



Section 3: Cleanup Process Checklist

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Review email performance metrics for bounces and engagement metrics. Notate any insights here

Pull list of invalids and bounces to	
review	

Remove hard bounces	and remaining
invalids	

Scrub list for outdated contacts and
update

Check for duplicates, de-dupe if any	
found	

correct as possible
Review contacts for accuracy with sales or membership
Run reactivation campaign – remove

Check invalid emails for email typos,

Run reactivation campaign – remove inactive contacts who have not responded

How often will I audit my email performance metrics and perform cleanup process?

Biweekly	Monthly	Quarterly

Section 4: Audit Log

Date of Audit	Audited By	Date of Audit	Audited By	Date of Audit	Audited By



Section 5: Data Sources

List data systems or sources you will be drawing data from and the frequency at which they should be audited				
Are these systems integrated?				

Yes

No