

The Data Hygiene Guide

Below are the habits and small changes that keep your business' data usable — split into what to do this week, this month, this year, and a few bonus moves for anyone ready to go further.

This Week

Build the foundation

	Action	Category
☐	Map out how clients will be organized (city, service type, frequency, lead source, the more the better) and be sure to keep this in mind when building the new templates.	Organization
☐	Create one consistent template for every level (quotes, jobs, referrals, etc.). Retire every other version floating around	Templates
☐	Write the standard: how each form should be filled out perfectly.	Templates
☐	Decide your submission schedule (end of shift, end of week, etc.). The closer to the day of occurrence the better.	Timing
☐	Decide who is and isn't allowed to submit or edit data (to decrease inconsistency of entry)	Access
☐	If possible, digitize the templates (Notion or excel work great with tablets)	Organization

This Month

Put it into practice

	Action	Category
☐	Assign a client ID + job/quote ID to every new quote and job, using the template (Can also be done after templates are submitted and extracted into excel files)	Identifiers
☐	Use the new template for every quote, job, client — no exceptions. Anomalies should be transferred over to the templates and submitted in the same manner.	Templates
☐	Save every form to the same folder/location, every time (preferably on a cloud)	Storage
☐	Submit data on the schedule you set consistently	Timing
☐	Encourage your team: flag anything that looks off immediately	Maintenance
☐	Run one pass through existing records to catch duplicates or gaps (this is your first audit — create checklist of how to audit and use that every time)	Maintenance

This Year

Build the system around it

	Action	Category
☐	Move data storage to one centralized, cloud-based system (Microsoft, Google, One Drive, etc.)	Storage
☐	Set up automatic backups	Storage
☐	Put a recurring audit on the calendar (the earlier on in the implementation process, the more frequent these should occur – should NEVER audit less frequent than a quarterly basis)	Maintenance
☐	Build a short onboarding/training routine for new hires, especially if turnover is high. Introduce templates and process flow into orientation. Documentation should have its own dedicated spot in orientation.	Maintenance

Bonus — For the Overachievers

	Action	Category
☐	Start capturing more than the basics — material cost, labor hours, subcontractor activity	Organization
☐	Look into automating your templates so data pulls into a spreadsheet on its own — this is where it gets more technical, and help is available if you want it	Automation

Checked everything off, bonus included? You're ready for the next level.

Revisit levoinsight.com or reach out for more resources.