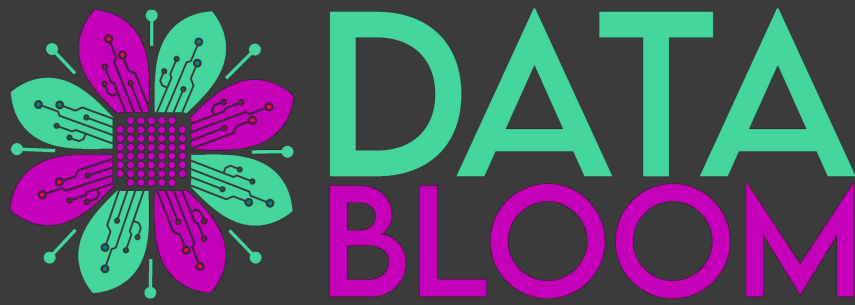




BUSINESS DATA AUDIT

DATA HEALTH CHECK.

The 15-minute self-audit to find out where your business data is strong — and where it's quietly costing you.

Score yourself /20

The companion workbook to the Data Bloom video · print it or fill it in as you watch

Take the guesswork out of your business decisions

How this **health check** works

Most businesses make decisions on data they haven't looked at in years. This is a quick check-up — not surgery. Work through it honestly and you'll know exactly where to focus.

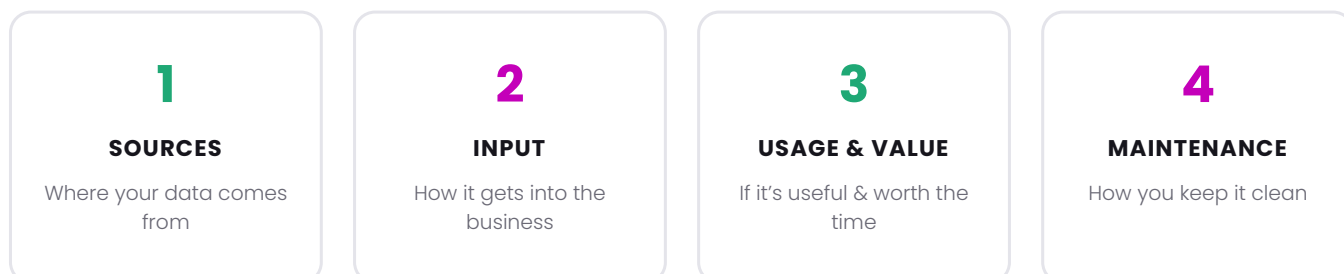
Why bother? Because bad data is **invisible until it's expensive**.

It's the email that bounces, the customer called by the wrong name, the forecast that's off because two systems counted the same sale twice, the budget spent chasing a segment that no longer exists. None of it feels like a "data problem" in the moment — but stacked up over a year it costs you real money and real trust.

HOW TO USE IT

- 1 Work through the **four sections**. Tick the questions you can confidently answer, and use the space to jot notes about your own business.
- 2 At the end of each section, **circle your score out of 5** — be honest, no one's marking this but you.
- 3 Add them up for a **total out of 20**, then turn to the action plan. **Your lowest-scoring section is your priority.**

THE FOUR AREAS YOU'LL SCORE



SECTION

1

SOURCES

Where does your data come from?

You can't trust data if you don't know where it's born.

AUDIT QUESTIONS

- ☐ Can you **name every source** your data comes from? (Website forms, checkout, CRM, spreadsheets, third-party tools, email, social...)
- ☐ Do you know which sources you **actually trust** — and which you don't?
- ☐ Does any critical data live in **one person's head** or one person's laptop?
- ☐ When two sources disagree, have you decided **which one wins**?

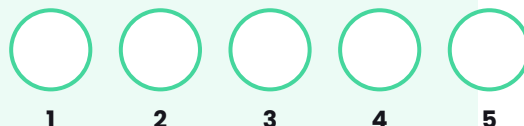
YOUR MAIN SOURCES & YOUR "SOURCE OF TRUTH" FOR EACH TYPE

The fix — the trap isn't having no sources, it's having too many that don't agree. For each key data type (customers, sales, inventory...) pick **one source of truth**: the place everyone trusts when numbers conflict.



Score this section

5 = you know every source & your source of truth · 1 = the Wild West



SECTION

2

INPUT

How does it get in?

This is where most of your errors are born.

AUDIT QUESTIONS

- ☐ For each source, is the data entered **automatically** or **by hand**?
- ☐ Where humans type, is there anything **stopping nonsense** being entered?
- ☐ Do two people ever enter the same thing differently? (**"UK"** vs **"United Kingdom"** vs **"GB"**)
- ☐ Are your important fields **required** — or easy to skip and "fill in later"?

YOUR MANUAL ENTRY POINTS & WHERE INCONSISTENCY CREEPS IN

The fix — standardise your inputs. Use **dropdowns instead of free text** wherever you can, make important fields **required**, and write one simple rule everyone follows. You're not chasing perfect — **consistency beats perfection.**



Score this section

5 = inputs automated or tightly controlled · 1 = a free-for-all



Is it useful — and is it worth it?

What it's for, whether it's still relevant, and what it costs you.

AUDIT QUESTIONS

- ☐ What **decisions** in your business depend on this data? (Pricing, marketing, follow-ups, forecasting...)
- ☐ Is it **still relevant** to how you run things *now* — or are you collecting it out of habit?
- ☐ How much **time** goes into gathering & managing it — and is that worth what you get back?
- ☐ Does it **reach the right people**, in a usable form, at the right time?

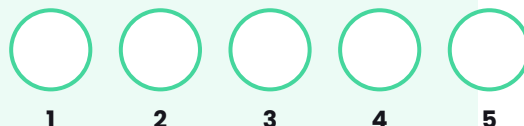
TIME-VS-VALUE GRID — LIST EACH DATA SET (CUSTOMER LIST, PIPELINE, SUBSCRIBERS...) AND DECIDE ITS FATE

Data set	What it's used for	Still relevant? (Y/N)	Time to manage (H/M/L)	Value (H/M/L)	Keep / Review / Kill

The fix — time spent managing * value it creates = keep or kill. If a data set drives no decision, is outdated, or eats hours for little return, that's not data management — it's a hobby. Protect the gold; bin the rest.

Score this section

5 = drives clear decisions, all relevant, worth the time · 1 = collected for its own sake



SECTION

4

MAINTENANCE

How do you keep it clean?

Data isn't a one-time job — it decays around 20–30% a year.

AUDIT QUESTIONS

- ☐ Do you have a **regular routine** to review & clean data — or only when something breaks?
- ☐ **Who owns it?** Whose actual job is it to keep it accurate?
- ☐ Do you **de-duplicate, fix errors and remove dead records** on any kind of schedule?
- ☐ When something's wrong, is there a **clear way to flag and fix it?**

YOUR CLEANING ROUTINE, ITS OWNER & REVIEW SCHEDULE

The fix — make it boring and routine. Put a recurring review in the calendar, **give it an owner** (a job that belongs to everyone belongs to no one), and agree simple rules for duplicates, “complete” records and archiving. No fancy tools needed — just a reminder and a responsible person.



Score this section

5 = a routine, an owner & clear rules · 1 = only touched when it's on fire



ADD IT UP

Your data health score

1 · SOURCES	+	2 · INPUT	+	3 · VALUE	+	4 · UPKEEP
OUT OF 5		OUT OF 5		OUT OF 5		OUT OF 5

YOUR TOTAL

/ 20

16–20

Great shape. Your data is an asset. The job now is to protect it and not get complacent — keep the routines running.

10–15

Solid foundation, real gaps. You're ahead of most. Pick your lowest section and start there — one fix at a time.

Below 10

Needs attention — and most people land here, so no shame. Your data is likely costing you more than you realise. The good news: you now know exactly where to start.

Your priority is your **lowest-scoring section** — not all four at once. Fix that one thing, then re-score in a month.

MAKE IT HAPPEN

My data action plan

Don't just file this away — commit to one change. Future you will thank you.

MY TOTAL SCORE

MY LOWEST (PRIORITY) SECTION

MY TOP 3 ACTIONS OVER THE NEXT MONTH

WHO OWNS THIS

I'LL RE-CHECK MY DATA ON

Want a hand making your data work for you?

At Data Bloom we take the guesswork and emotion out of business decisions — from CRM systems and clean data to reporting that actually drives action. If your score stings, let's talk.

Book a review meetings-eu1.hubspot.com/james-yeabsley

Website databloom.co.uk

YouTube [@DataBloomBusiness](https://www.youtube.com/@DataBloomBusiness)

LinkedIn linkedin.com/in/jamesyeabsley