

Data analysis Toolpak

Investigating the Ins and Outs of Your CRM Data

The first step of effectively mining CRM for valuable insights and data is to survey the landscape by getting full access to your CRM system as well as any online or onsite backup data storage device where CRM data might also be archived.

Grouping the Data Together

To do anything meaningful with the data, it need to get it together in an easily access place — for example, as a series of spreadsheets, a set of interconnected tables, or a whole relational database that allows you to run queries and reports. that crop up through the standardization of format and normalization of data values.

Defining the Units of Analysis

Any of these types of entities can be the object of an analysis. Moreover it can aggregate analyses of a lower level entity to get to a rich perspective on the higher-level entity. For example, studying behavior of all contacts of customers in a single segment allow to make broad analysis of the segment, itself. At the same time, may not have sufficient data to analyze certain types of entities, especially lower-level .

Conducting an Exploratory Analysis

Once all the data in place, to start doing some data profiling and initial exploratory analysis of the data you have pulled together in order to a) develop a sense of the data; and b) detect any potential issue early on.