

Hey, it's Kyle from HubSpot Academy. Duplicate data leads to bad experiences, for both your team and your customers.

For your team, duplicate data leads to inefficiency. Your marketers pull lists that include the same contact twice and have to manually remove one from their next send. Your sales reps have to search through six copies of the same company, all with incomplete data, to find their most recent call. Three members of your service team are in touch with the same customer, but none of them are aware because they're all communicating from a different place.

If duplicate data is bad for your team, it's even worse for your customers. They might get the same marketing email multiple times, have three different sales reps reach out, or have two onboarding consultants assigned to their company. With customer expectations higher than ever, poor experiences caused by bad data will lose you business.

But if you have a Professional or Enterprise version of Hubspot, you have access to a feature in HubSpot CRM that uses machine learning to identify duplicate contacts and companies. This makes finding and merging duplicate records simple. And, since it uses machine learning, it'll get smarter as you grow. Let's see what it looks like in action.

Inside your HubSpot account, go up to the main navigation and click on "Contacts." Here, you can access your contacts and companies. For this example, we'll go to contacts, but the de-duplication tools works exactly the same way on the companies page.

Here we are on the contacts page. To find duplicates, come over to the right-hand side of the screen and click the Actions button, then select "Manage duplicates" from the dropdown menu. Here you can see a list of all the duplicates the system has found in your account. Click the Review button next to a pair of contacts to see more information. Select the record you want to keep and then click Merge. Those two records have now been merged, and you can review another pair.

If you find a pair of contacts that aren't actually duplicates, click Dismiss. This will remove those records from the list of duplicates, and it will also train the system to be better at identifying duplicates in the future.

And that's all there is to it. If you have access to this tool, use it to check for duplicate contacts and companies regularly to ensure that your database is kept clean and tidy.