

Anchor Data & Marketing Checklist

Data Quality & Enrichment:

- ☐ Run NCOA (National Change of Address) updates
- ☐ Run CASS (Coding Accuracy Support System) updates
- ☐ Validate email addresses across customer database
- ☐ Validate phone numbers for accuracy
- ☐ Validate physical addresses for deliverability
- ☐ De-duplicate files to eliminate redundant records
- ☐ Append missing demographic data fields to customer profiles
- ☐ Identify omnichannel opportunities through enriched data

Compliance & Privacy

- ☐ Review consent language for clarity and compliance
- ☐ Audit opt-out mechanisms for accessibility
- ☐ Confirm TCPA (Telephone Consumer Protection Act) readiness
- ☐ Confirm CAN-SPAM compliance
- ☐ Confirm CCPA/CPRA and other state regulatory readiness
- ☐ Identify Deceased Individuals
- ☐ Update other suppression lists

Audience Segmentation

- ☐ Refresh loyalty tier segments
- ☐ Refresh high-value customer segments
- ☐ Refresh dormant account segments
- ☐ Refresh seasonal shopper segments
- ☐ Review lifetime customer value calculations
- ☐ Update predictive scores
- ☐ Update RFM (Recency, Frequency, Monetary) models



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Performance & Attribution

- ☐ Identify top-converting sources from 2025
- ☐ Identify top-converting lists from 2025
- ☐ Identify top-converting creative assets from 2025
- ☐ Adjust 2026 media investment priorities based on performance
- ☐ Adjust 2026 data investment priorities based on insights

Data Systems & Reporting

- ☐ Clean CRM fields and remove obsolete information
- ☐ Clean data warehouse fields
- ☐ Verify all system integrations are functioning correctly
- ☐ Verify dashboards are accurate and up-to-date
- ☐ Archive outdated data
- ☐ Review database design structure
- ☐ Assess database infrastructure needs for 2026

New Technology

- ☐ Evaluate LLM (Large Language Model) opportunities
- ☐ Identify use cases for AI to increase customer experience
- ☐ Explore automation tools for enhanced engagement

2026 Planning

- ☐ Lock in segmentation strategy for new year
- ☐ Finalize data roadmap for 2026
- ☐ Set Q1 KPIs and success metrics
- ☐ Create A/B testing calendar for continuous optimization



**Call our data experts today –
(800) 452-2357**