ACCURATE APPEND / CAMPAIGN DATA QUALITY

Holiday List Cleanup Checklist

Seven practical checks before launching email, direct mail, or phone/SMS outreach

- [ ] **1. Remove duplicates safely**
  Check customer IDs, emails, and household matches; protect opt-outs, source history, and separate individuals.
- [ ] **2. Review existing email addresses**
  Screen known hard bounces and unsubscribes; review invalid, placeholder, and long-inactive addresses.
- [ ] **3. Distinguish postal workflows**
  Complete missing addresses separately from validation, standardization, and any required Move Update processing.
- [ ] **4. Check phone contact permissions**
  Review number quality, do-not-call status, prior opt-outs, and consent for the specific calling or texting method.
- [ ] **5. Append only useful missing fields**
  Identify the campaign decision each appended field should support; evaluate match quality and permitted use.
- [ ] **6. Set readiness by channel**
  Maintain separate approval statuses for email, postal mail, and phone/SMS rather than a single clean/not-clean flag.
- [ ] **7. QA the final approved export**
  Reconcile IDs and appended fields; sample across record groups; verify suppressions remain enforced.

Channel-Readiness Decisions

Data condition	Required review	Current status
Existing email with acceptable verification	Subscription preferences and suppressions	Email review
Missing email on an existing record	Consider Email Append; then review permission	Hold
Possible postal move or formatting issue	Address validation or applicable postal update	Hold
Missing postal address	Evaluate Address Append if appropriate	Hold
Phone number with unclear outreach permission	Consent, opt-outs and do-not-call screening	Exclude pending clearance

Final check: Have the campaign owner approve each channel-specific export before scheduling.

Appended or verified contact data does not itself grant marketing permission. Follow applicable laws and platform rules.