

Data Cleansing Plan Example

1. Purpose

This document outlines the approach and activities for cleansing data prior to migration or analysis, ensuring high data quality.

2. Scope

Applies to the customer records in the legacy CRM system scheduled for import into the new CRM platform.

3. Cleansing Activities

1. Profile source data to identify anomalies and issues.
2. Standardize formats (dates, phone numbers, addresses).
3. Remove duplicate records.
4. Fill missing mandatory fields where possible.
5. Correct invalid or inconsistent entries.
6. Document and report unresolved issues.

4. Roles and Responsibilities

Role	Responsibility
Data Owner	Approve data cleansing rules and exceptions
Data Steward	Execute, monitor, and validate cleansing activities
Business Analyst	Define data requirements and cleansing criteria

5. Data Cleansing Rules Example

Issue	Rule
Missing Email Address	Mark record for manual review
Invalid Date Format	Convert to YYYY-MM-DD
Duplicate Customer	Retain the most recent record

6. Timeline

- Data Profiling: Week 1
- Cleansing Activities: Weeks 2-3
- Validation/Sign-Off: Week 4

7. Sign-Off

Data cleansing plan reviewed and approved by Data Owner and Project Manager.

