

Wings^{4U}



4 Ways to Clean Your Customer & Advocate Contact Database with AI

A joint service by Wings4U & Repetitos

Your Customer Contact Database is a Mess

The not-so-hidden secret at many B2B companies is that their customer contact database is a mess, and **nobody owns it**.

- Sales can't spend their time updating contact data
- Customer Success can only keep track of 1-2 key contacts per account
- Ops teams focus on prospects
- Customer marketers focus on 1-1 customer relationships with advocates

With nobody owning it, **contact data health** ends up on the back burner, **decaying 2% every month**. This impacts everything from:

- Events & Compliance with email privacy regulations
- Crisis communication and Renewals
- Identifying cross-sell opportunities and Nurturing repeat buyers.

With an average Customer Contact Database health score of 47%, companies are failing themselves and their customers*.

This impacts revenue and cannot be acceptable.

*According to the [2025 State of Customer Contact Databases Report](#)

3 levels of customer contact database health

Basic Clean-up Free AI Prompts

Data entry errors, typos, blank fields, and standardizations

Update & Enrich with [AdvoSync](#)

Current employers, titles, locations, and LinkedIn profiles with no annual contracts.

Expand

Customer contact list by 2-3X

PURPOSE OF THIS REPORT

Before investing resources into updating, enriching, and expanding your customer and advocate databases, **let's address basic data clean-up.**

The good news is that basic clean-up is self-serve and doesn't have to go through procurement or legal, and can be done in days, not months. By doing this, not only will your customer contact database be that much more functional, but you will have earned the right to address updating and enriching.

GETTING STARTED

How AI Prompts Can Help You Clean Your Contact Database

Follow these 7 steps for a basic data clean-up.

- 1** Download a customer contact spreadsheet from your CRM. You may want to start with a subset of your most important contacts.
- 2** Keep these columns: CRM unique identifier, first name, last name, email, company, location (city, state, country), and title. Delete the other columns.
- 3** Keep track of the number of blank fields in each column. This may be an important metric.
- 4** Use the AI prompts. You may not use all of them. We suggest starting with FIRST NAME.
- 5** Ask AI for a summary of what it fixed. Also, eyeball and fix any changes.
- 6** Upload to the CRM.
- 7** Based on the results, report on what you learned (e.g. number of blank fields, incorrect first names, typos), suggest workflow or CRM changes to improve the data.

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AI PROMPTS

Field - FIRST NAME

Is it capitalized, Dr. or Ms., their email address, their last name, or an initial? The last name is not as important as it is less likely to be used. What is very tricky are nicknames. We suggest using their name in LinkedIn. This is addressed when updating and enriching.

- **Imagine:** Receiving an email that starts with Hello Ms. or Hello T...
- **Results:** In the sample below, 50% had a corrected first name, 20% did not have enough data to correct, and 30% were fine. AI will fix most typos and email addresses help AI determine the correct name.

First Name	Last Name	Updated First Name	Updated Last Name	Change to First Name
Sally	joyce	Sally	Joyce	N
Schirani	Alia	Alia	Schirani	Y
Dr.	Lee			Null
C	Handel	Courtney	Handel	Y
Ms.	Loat	Susan	Loat	Y
Joe.jones@gmail.com	Jones	Joe	Jones	Y
Alexia	K	Alexa	Komer	N
Ali	T	Ali		N
HR	Support			Null
RenataDiaz	Diaz	Renata	Diaz	Y

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AI PROMPTS

Field - LOCATIONS

It's important to know where people live. This is for compliance with email privacy regulations, in-person event invites or language preferences.

- **Imagine:** Having customer contacts in NY, NYC, New York, New York City in your CRM. Way too much filtering and potential confusion. States/Provinces and Countries have standardized 2-letter codes. For example, MA, Mass, and Massachusetts is MA, or Switzerland (CH), China (CN), and South Africa (ZA).

This is your opportunity to tell AI the standard for cities (e.g. spell out New York City) and countries (UK or England, Scotland, Wales, Northern Ireland).

- **Results:** Country and State/Province 2-letter codes make filtering so much easier. AI can determine the State and Country, even if there is a partial city name, such as Rio, LA, or Greater Berlin (LinkedIn often uses this).

Original Entry	Updated City	Updated State/ Province	Updated Country Code
NY, NY	New York City		US
NYC	New York City	NY	US
Greater Berlin	Berlin	BE	DE
Rio	Rio de Janeiro		BR
Joburg, South Africa	Johannesburg		ZA
Greater Cairo	Cairo		EG
LA, California	Los Angeles	CA	US
Houston		TX	US
Mexico City		CMX	MX
Karachi, Pakistan		SD	PK

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AI PROMPTS

Field - TITLES

As your segmentation gets more sophisticated, non-standardized titles in a spreadsheet add to the confusion.

- **Imagine:** Having these titles: SVP, Senior VP, Senior Vice-President, Sr. VP, and Sr. Vice-President. Multiply that across thousands of titles, and it's a mess.
- **Results:** Titles are the foundation of segmentation, and this prompt will standardize how titles are handled. For example, no abbreviations or the structure is: Role, What they do (e.g. Director, Customer Marketing). Plus, notice the fixed typos in the example below.

Titles are generally not included in emails, and CRM standardization is more important than 100% fidelity to the title.

When updating and enriching, significant title changes will be uncovered (e.g. promotion from Manager to Director).

Original Title	Updated Title	Change
CEO	Chief Executive Officer	Y
chef exec officer	Chief Executive Officer	Y
Chief Revenue Officer	Chief Revenue Officer	N
Chief Rechncial Officer	Chief Technology Officer	Y
CTO	Chief Technology Officer	N
Customer Marketing Director	Director, Customer Marketing	Y
Dir. Customer & lifecycle Marketing	Director, Customer & Lifecycle Marketing	Y
Sr. Vice President, Customer Marketing	Senior Vice President, Customer Marketing	Y
Customer Marketing Senior VP	Senior Vice President, Customer Marketing	Y
SVP Customer Marketing	Senior Vice President, Customer Marketing	Y

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AI PROMPTS

Field - COMPANY NAME

To make an email relevant, especially when discussing results or value realization, it's helpful to add the company name in the text. Account names pulled from a CRM are often the legal name or some other name that procurement uses.

- **Imagine:** Think about a cross-sell email that mentions how the Ford Motor Company of Michigan is using your product. Everybody calls it Ford.
- **Results:** Take this list to your CRM team and have them add a field for the customer's Brand/Common Name. To help make the case, bring an example of an email you plan on sending.

Company Legal Name / Name in the CRM	Brand/ Common Name
Amazon.com, Inc.	Amazon
Costco Wholesale Corporation	Costco
Federal National Mortgage Association	Fannie Mae
General Electric Company	GE
Liberty Mutual Holding Company Inc.	Liberty Mutual
Publix Super Markets, Inc.	Publix
State Farm Mutual Automobile Insurance Company	State Farm
Teachers Insurance and Annuity Association of America	TIAA
The Boeing Company	Boeing
The Walt Disney Company	Disney

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RESOURCES

AI Tools We Use



The AI tools are evolving. Currently,

- ★ **Free AI:** Gemini has the fewest usage limitations, and we suggest starting with it.
- ★ **Paid AI:** Claude's paid version supports Excel. If you live in Excel, Clade is ideal.

Tips When Uploading Data to AI

- You can either copy and paste a list, which looks very messy and can be confusing, or save your spreadsheet as a CSV and send it to AI. This strips away the formatting and hidden metadata, leaving only the raw data. It's the closest thing to a "perfect" copy-paste for the AI's brain.
- **Clear Headers:** Ensure your first row has very clear labels (e.g., "First Name") and no empty rows above it.

FAQ's

How often should we clean up the customer or advocate database?

We suggest going through this exercise on a quarterly basis. It will be much easier after the first round, but there will always be new names to clean up.

Where can I learn more about updating, enriching, and expanding the customer contact and advocate database?

Check out [AdvoSync](#), a joint offering of Wings4u and Repetitos. It is the only service of its kind that will update and enrich for you with no annual contracts at an amazing price point.

Ready to do a basic database clean-up?

Contact us to get the **FREE AI prompts**

