5 Steps to Protect Your Data

A quick-start guide for marketing, data, and digital leaders who want a safer, cleaner, more trusted data foundation.

Learn more at TheConvergenceFactor.com

THE CONVERGENCE FACTOR
DATA · AI · MARTECH
BRIDGING SILOS. CONNECTING PEOPLE & PLATFORMS. DRIVING CONVERSIONS.

Your data is the engine behind every campaign, customer journey, and AI model. If it's exposed, mismanaged, or inaccurate, growth stops. Use this one-page guide to protect your data, tighten controls, and strengthen your organization's trust foundation.

1 Know What You Have
Map Your Critical Data

Identify your "crown jewel" datasets, where they live, who owns them, and how they move across your stack.
Start with the data powering your most important journeys: lead gen, onboarding, renewal, and revenue.

Ask Your Team:
- Can we list our top 5 most valuable datasets?
- Do we know every system storing customer data?
- Do we understand our major data flows?

2 Control Who Can Access It
Tighten Roles, Permissions & Oversight

Use role-based access control (RBAC), apply least-privilege permissions, require MFA, and remove stale access for old employees, agencies, and service accounts.

Ask Your Team:
- Who can export raw customer data today?
- Do agency partners still have admin access?
- If someone left today, could we remove access everywhere?

3 Align Consent & Compliance
Collect and Use Data the Right Way

Ensure consent, preferences, and privacy policies match what's actually happening across tools.
Honor unsubscribe and privacy settings across CRM, CDP, email, ads, and analytics.

Ask Your Team:
- Can we prove when and how a customer gave consent?
- Are tracking scripts aligned to our privacy policy?
- Do all systems honor preference changes?

4 Improve Data Quality
Garbage In = Garbage Out

Define data standards, naming conventions, required fields, and validation rules.
Assign owners, de-duplicate records, and run regular data quality checks.

Ask Your Team:
- How many duplicates exist in CRM or CDP?
- Do leaders trust our dashboards?
- Are AI models trained on clean or messy data?

5 Monitor, Test & Prepare
Don't Wait for a Crisis

Put monitoring in place for unusual access, large exports, and failed logins.
Create a simple 1–2 page incident response plan and rehearse scenarios annually.

Ask Your Team:
- Who's the first call if something goes wrong?
- Have we tested restoring key systems?
- Do we have a recovery playbook ready?

Ready to Strengthen Your Data Foundation?

Most organizations don't have a "data problem"—they have a convergence problem.
The Convergence Factor™ helps leaders protect their data, reduce risk, and build a foundation ready for AI, personalization, and revenue growth.

Get an Assessment

Learn more at TheConvergenceFactor.com