



salesforce

Prospect Database Cleaning Guide

Maintaining your prospect database in Marketing
Cloud Account Engagement (MCAE)

Updated August 2023

Find the latest version [here](#), and download for clickable hyperlinks.

Prospect Database Cleaning Guide

Table of Contents

Introduction

Why prospect database hygiene matters	3
Summary of options	4

Database Cleaning FAQs

How do database limits in MC Account Engagement (MCAE) work?	5
How can I keep track of my limits?	5
I'm over my database limit. What do I do?	5
I'm ready to reduce my database. What next?	5
Should I mark prospects as Do Not Email, or delete them?	6
How do I delete prospects?	6
What happens when I delete a prospect?	7
How does MCAE's Recycle Bin work?	7
What type of criteria will help me identify cold prospects?	8
I'm back under my limit. How do I stay there long term?	9

Dynamic List & Automation Rule Examples

Dynamic list for re-engagement program	10
Dynamic list for permission pass	11
Dynamic list for identifying prospects to delete immediately	12
Automation rule for excluding competitors	13
Resources	14

Prospect Database Cleaning: Why Does it Matter?

With the focus on lead generation and hot prospects, it's easy for marketers to overlook a growing number of disinterested prospects cluttering up their database and email lists. *Cleaning your database might be faster and easier than you think, though, and not cleaning it can cause a host of problems.*

Here are four reasons to care about keeping only relevant prospects in your database:

1. **Cost.** If you're billed by database size, housing cold prospects wastes money.
2. **Skewed Email Metrics.** A database crowded with cold prospects leads to low open rates, click-through rates, and other key performance indicators (KPIs).
3. **Decreased Deliverability.** Internet Service Providers (ISPs) also monitor some KPIs. If ISPs register that your emails are consistently being ignored by many recipients, it can hurt your deliverability and sending reputation.
4. **Spam Complaints Increase.** Just because a prospect once engaged or opted-in to your email doesn't mean they want your email for life. Emailing disengaged prospects makes it more likely that a prospect will report your email as spam. Increased spam complaints can land your email sending IP on a blacklist.

So what's next once you decide to clean your prospect database?

The fastest way to make a dent in your database population *today* is to delete those cold prospects in mass using a **dynamic list** and **table action**.

Strategic options that take more time include sending a **permission pass** to cold prospects, or adding cold prospects to a **re-engagement nurturing program** in an effort to win back their attention before you delete them.

Read on to learn more!

Summary of Options

Methods for cultivating a healthy prospect database will vary by company. Here's an overview of steps you might take depending on your goals.

Goal: Get back under database limit – and fast!

If you already exceeded your Marketing Cloud Account Engagement (MCAE) database limit and that your database is crowded with prospects who are unlikely to re-engage, deleting cold prospects in mass might be a quick win for you. For example, you could run a dynamic list of prospects created at least 18 months ago who have been inactive for at least 12 months, then use a table action to delete them in a matter of minutes!

You can also pay to increase your database storage limit at any time, but it's still important to ensure your prospects are active and want to hear from you.

Goal: Delete cold prospects only after attempting to re-engage them

If you are approaching your MCAE database limit but know that some of your cold prospects just need a nudge, consider taking the time to send a one-time [permission pass email](#), or to launch a re-engagement nurturing program using Engagement Studio.

More on Re-Engagement Programs:

- [Common Templates for Engagement Studio](#)
- [10 Best Re-engagement Emails to Win Your Subscribers Back | Mailmunch](#)
- [10 Re-Engagement Email Examples to Win Back Customers \(+ Subject Lines\)](#)

Goal: Stay within database limits long term

To ensure your prospect database is populated with only engaged, warm prospects long term, use a combination of the options above. Create a dynamic list or automation rule that captures cold, aging prospect records. You may choose to:

- Set a reminder to check the list regularly and delete matching prospects.
- Feed the list into a re-engagement program, then delete prospects who do not engage with any emails in the program.
- Send an annual permission pass to everyone on the list, wait about a week and delete anyone who did not engage with the permission pass.

FAQs: Limits, Logic, DNE, & MCAE's Recycle Bin

Now that you have a summary of options for pruning your database, let's unpack some of the tools, terms, and common questions that you'll encounter.

How do database limits in MCAE work?

Your MCAE account comes with a database limit allowing a certain number of mailable prospects in your instance at any given time. All MCAE accounts start with a default limit of 10,000 mailable prospects.

Purchase additional blocks of 10,000 mailable prospects as needed.

How can I see my limit and remaining capacity?

Here's where to find your database limit and usage depending on your user interface:

- In Account Engagement Lightning App, click the **Account Engagement Settings** tab, then **Account Settings > Usage and Limits > Mailable Database**
- In the Classic UI,, go to **Account Settings > Usage and Limits > Mailable Database**

I'm over or approaching my database limit. What are my options?

When you reach your database limit, you can do one *or both* of the following:

- Delete irrelevant mailable prospects or mark them as **Do Not Email (DNE)**.
- Increase your database limit. Contact your Account Executive for details.

I'm ready to cut back on mailable prospects. What next?

Here are three short-term options to reduce the number of mailable prospects in your MCAE database:

- Build a dynamic list of cold prospects and use a table action to delete them.
- Run an automation rule to look for prospects matching certain criteria and use a completion action to mark them as Do Not Email.
- Consider disabling the [Salesforce connector setting](#) to “*Automatically create prospects in MCAE if they are created as a Lead or Contact in Salesforce.*”

To get back under my limit, should I delete mailable prospects, or should I mark them as Do Not Email (DNE)?

Neither prospects marked as Do Not Email nor prospects in your Recycle Bin count toward your mailable database limit. Here's how to decide when to use each.

- **Mark prospects as Do Not Email** if you know you do not intend to email those prospects anymore, but want to keep tracking their engagement.
- **Delete prospects** if you consider them obsolete, they are cluttering your database, or if you may wish to resume emailing them if they re-engage in the future.

How do I delete prospects?

Use [table actions](#) to delete prospects in mass. Once you create a list of prospects you want to delete, click the name of the list to view the table of prospects. Select the checkbox at the top-left of the table; select all entries on the table or manually tick the boxes for certain prospects; and select *Delete* from the **table actions** dropdown in the lower left corner.

Note: Deleting a list does not delete prospects that were on the list. Be sure to select and delete the prospects as shown below.

The screenshot shows a web interface for managing prospects. At the top, there are filters for 'View' (All Prospects), '(Based on 12am EDT):' (Created), and 'Filter:' (All Time). A 'Go' button and a 'Tags' dropdown are also present. A '+ Add Prospect' button is in the top right. Below the filters is a table of prospects. The first row of the table has a checked checkbox and a star icon. A message above the table states: 'All 5 entries on this page are selected. Select all 1902 entries in this table'. The table columns are: NAME, COMPANY, JOB TITLE, SC..., GR..., LAST ACTIVITY, and ACTIONS. The first five rows of the table are highlighted. At the bottom left, a dropdown menu shows 'With 5 selected: Delete' and a 'Go' button. The bottom right of the table shows '1 - 5 OF 1902 ITEMS'.

NAME	COMPANY	JOB TITLE	SC...	GR...	LAST ACTIVITY	ACTIONS
Adelle Abbott	Denesik LLC	Content Marketing Manager	154	B	Jun 5, 2021 8:49 AM	⚙️
Aliza Abbott	Prosacco-Waelchi	CEO	135	B+	May 12, 2021 7:05 PM	⚙️
Gennaro Abbott	Harris and Sons	CE	160	A	Jun 5, 2021 2:13 AM	⚙️
Gregory E Abel	Bernhard-Ritchie	Sr Services Manager	330	C-	Oct 22, 2021 10:50 AM	⚙️
Mr. Ron Abelin	DataTek Applications	VP of Operations	177		Oct 22, 2021 10:50 AM	⚙️

What happens when I delete a prospect?

When you delete a prospect, they move to the MCAE recycle bin, where they are essentially archived until you either permanently delete them, or they are restored to your database in one of a few ways. See below.

How does MCAE's Recycle Bin work?

Here's what you need to know about deleted prospects stored in the recycle bin.

- Deleted prospects are not mailable and don't count toward your database limit.
- A prospect's activities are **not** tracked while they are in the recycle bin.
- MCAE Automations will not act on deleted prospects.
- Deleted prospects will no longer display on MCAE lists; undeleted prospects will automatically become visible again on their original lists.
- Deleted prospects will not appear on MCAE reports.
- Deleted prospects will appear in B2B Marketing Analytics (B2BMA) datasets and lenses unless filtered out.
- Deleted prospects will not appear in your MCAE global search results.
- Deleting a prospect will not delete the synced Salesforce lead or contact record.
- Updating a synced lead or contact record will not undelete the MCAE prospect.
- Deleted prospects remain archived in the recycle bin indefinitely unless
 - they are **undeleted** by a MCAE user via table action.
 - they are undeleted using an **option during import** to *"Un-delete matching prospects found in the recycle bin during this import."* This is the best way to undelete prospects in mass.
 - a deleted prospect re-engages by **submitting a MCAE-tracked form**, automatically undeleting them.
 - they are **permanently deleted** by a user.

Learn more about how to [Delete and Undelete Prospects](#).

I'm ready to clean my database. What automation criteria will help me identify prospects to delete or mark as Do Not Email?

Dynamic lists and automation rules allow you to identify and take action on prospects who are disengaged or no longer relevant in your database. Consider using one or more of the following criteria when creating your rule or dynamic list.

Criterion	Rule logic to select in MCAE	When and why to use
Prospect Score in MCAE	Prospect score <input type="text" value="Prospect score"/> is greater than <input type="text"/>	Low prospect score indicates low engagement with your MCAE-tracked assets. Capture old, cold prospects by combining score with other criteria.
Prospect creation date	Prospect time <input type="text" value="created days ago"/> <input type="text" value="Prospect time"/> created days ago is greater than <input type="text"/>	Time prospect has existed in your MCAE database. Combine with score or last activity date to pinpoint old <i>and</i> unengaged prospects. For example, you might delete prospects created ≥ 365 days ago with a score ≤ 50 , or put them on a re-engagement program.
Last activity date	Prospect time <input type="text" value="last activity days ago"/> <input type="text" value="Prospect time"/> last activity days ago is greater than <input type="text"/>	Indicates last time prospect took non-passive action . Best used with prospect score and creation date to surface long-time inactive prospects.
Number of emails sent in a timeframe	Prospect has been emailed <i>(Only available in dynamic list logic)</i> <input type="text" value="Prospect has been emailed"/> at least <input type="text"/> time(s) in the last <input type="text"/> day(s)	Use to clean out prospects you haven't recently emailed through MCAE. Pro tip: To find prospects <i>not</i> recently emailed, create a second dynamic list or automation tool using this criteria: Prospect list → isn't a member of → List 1
Number of emails prospect has opened	Prospect email opens <input type="text" value="Prospect email opens"/> has opened any email <input type="text"/> in the last <input type="text"/>	Include if you consider email opens to be meaningful engagement. MCAE considers email opens a passive action not counted in last activity date.
Grade in MCAE	Prospect grade <input type="text" value="Prospect grade"/> is less than <input type="text" value="C-"/>	Use if you grade your prospects using MCAE automation rules and profiles. Example: Delete prospects with a grade $\leq C-$ with created date ≥ 100 days ago.
Email domain	Prospect default field <input type="text" value="Email"/> Email <input type="text" value="contains"/> <input type="text" value="@XYZ"/>	Use this logic to surface competitors or internal employees in your database; optionally delete or mark as Do Not Email.

To see some of those criteria in the context of an automation tool or dynamic list, see pages 10-13. You can create similar automations with your preferred criteria for identifying cold prospects.

I'm back under my limit. How do I stay there long term?

Your MCAE database size will fluctuate with time. Make a plan for your long-term strategy by considering the following options.

- Maintain a dynamic list of inactive prospects that feeds a [re-engagement program](#). Delete any prospects who complete the program without clicking a link to engage with any of the program's emails.
- Perform an annual [permission pass](#) on your long-time prospects, and keep only those who indicate that they still want to receive your emails.
- Evaluate your lead generation metrics to plan for the future of your database. For example, if you know that 10,000 site visitors will convert to prospects every year, budget to purchase an additional database block annually.

Identifying Cold Prospects Using Dynamic List & Automation Rule Examples

Now you know answers to frequently asked questions related to prospect database hygiene. Next, let's explore how to use MCAE automation tools to segment disengaged prospects for re-engagement, deletion, or marking as Do Not Email.

First, here are paths and list criteria for three different audiences of inactive prospects. Notice some of the criteria described on page 8. Think about what criteria you may add.

List 1: Prospects to put on a re-engagement nurturing program

Dynamic List criteria: Prospects <1 year old who have been inactive for at least 3-6 months.

Possible use case: Add this dynamic list to an Engagement Studio program of three emails, spaced seven to 10 days apart, each with a compelling call to action.

See [re-engagement email examples here](#) and [here](#). At the end of the program, add prospects who never clicked any links to an inactive list. Delete prospects from that list regularly.

The screenshot shows the 'Dynamic List Rules' configuration page in MCAE. The page title is 'DL to Re-Engage Cold Prospects'. At the top, there are tabs for 'BUILDING' (active) and 'TESTING'. A 'Basic Info' button is visible in the top right. The main section is titled 'Dynamic List Rules' and features a 'Match type' section with 'Match all' selected and 'Match any' unselected. Below this, there are two rule conditions. The first rule is: 'Prospect time' is 'created days ago' 'is less than' 365. The second rule is: 'Prospect time' is 'last activity days ago' 'is greater than' 120. At the bottom of the rule configuration area, there are buttons for '+ Add new rule' and '+ Add new rule group'. At the very bottom of the interface, there are three buttons: 'Preview', 'Run Rules', and 'Cancel'.

List 2: Prospects to receive a Permission Pass

Dynamic List criteria: Prospects between 1-2 years old who have been inactive for at least 6 months.

Use case: A [permission pass](#) is a one-time email asking prospects if they would like to still receive your emails. Permission passes are often recommended for older lists, lists of unknown origin, or in this case, lists of long-inactive prospects. Allow recipients one to two weeks to click your link confirming they still want to receive your emails. Then any prospect that has not confirmed their opt-in by completing the simple call to action must be deleted or marked as Do Not Email.

Best practice: Send a permission pass once or twice a year *even when you're not approaching your database limit*. This is best practice to ensure that all remaining prospects in your database truly want to hear from you.

The screenshot shows a configuration interface for a Dynamic List. At the top, the list name is "DL for Annual Permission Pass" with tags for "BUILDING" and "TESTING". A "Basic Info" button is visible. The "Dynamic List Rules" section has "Match type" set to "Match all". Three rules are defined:

- Rule 1: Prospect time created days ago is greater than 365.
- Rule 2: Prospect time created days ago is less than 730.
- Rule 3: Prospect time last activity days ago is greater than 180.

Buttons for "Add new rule" and "Add new rule group" are at the bottom. Action buttons "Preview", "Run Rules", and "Cancel" are at the bottom right.

List 3: Prospects to delete immediately

Dynamic List criteria: Prospects created at least 18 months ago who have been inactive for at least 1 year.

Use case: This path clears the clutter immediately and gives your database instant breathing room. It's fast and easy because there's no need to create additional content or wait for a prospect's response. If you want to be extra-sure you're deleting only irrelevant prospects, consider building in additional criteria, like prospect score below 50, or no recent email opens.

DL - Prospects to Delete Now ✎ BUILDING 👁 TESTING ✎ Basic Info ⚙

Dynamic List Rules

Match type Match all Match any

+ 🗑 Prospect time

and

+ 🗑 Prospect time

+ Add new rule + Add new rule group

Preview Run Rules Cancel

Finally, here is an automation rule to help you exclude competitors from your mailable database, also preventing them from mining your marketing email content.

Automation Rule to mark competitors as Do Not Email (DNE)

Create Automation Rules

Name

Folder

Tags
Note: Tags are applied to the automation rule only

Repeat Rule 
Allows rule to match prospects more than once.

Days before eligible to repeat rule:

Limit rule matches? No, allow unlimited matches.
 Yes, limit total matches to:

Rules

Match Type Match all Match any
Automation Rules are retroactive and affect all prospects that meet the selected criteria.

Prospect default field

and

Prospect email status

Actions

Change prospect default field

Optional setting: Repeat Rule

By default, an automation rule only acts once per applicable prospect. The **Repeat Rule** setting allows it to act on the same prospects as often as they meet the criteria. In this case, the setting allows you to ensure competitors are always marked as DNE even if someone clears the Do Not Email field.

Now you are ready to maintain a clean, engaged prospect database!

Resources

Help & Training Articles:

- [Keeping MCAE clean](#)
- [Database Hygiene Tips](#)
- [Delete or Undelete Prospects](#)
- [Using the Recycle Bin](#)
- [Manage Prospect Mailability](#)
- [Permission Passes](#)

Downloadable Guide: [Common Templates for Engagement Studio](#)

Blogs:

[10 Best Re-engagement Emails to Win Your Subscribers Back | Mailmunch](#)

[10 Re-Engagement Email Examples to Win Back Customers \(+ Subject Lines\)](#)

Expert Coaching Session for customers with a MCAE Premier Success Plan:
[Review: MCAE: Database Hygiene Assessment](#)

Pardot is now called Marketing Cloud Account Engagement (MCAE). Thanks for your patience as we work to update the name everywhere, including in the app itself.