Good Habits

A few simple habits keep the CRM trustworthy for everyone who relies on it. None are difficult — they're mostly about being thoughtful with shared information.

Keep information current. The CRM is only as useful as it is up to date. When you learn that something has changed — a new phone number, a completed session, a changed status — update it promptly, so the next person sees the true picture.

Put information where it belongs. The model in Section 4 is your guide: personal details go on the **Contact**, role information on the matching profile, the mentoring relationship in the **Engagement**, and what happened at a meeting in its **Session**. Putting things in the right place is what lets everyone find them later.

Search before you create. Every person should have exactly one Contact, and every organization exactly one Company. Before adding a new record, search first — the person or company may already be in the system. A duplicate splits the history in two and causes confusion down the line.

Correct, don't delete. The CRM keeps records and their history on purpose — a retired mentor, a closed engagement, a past session all stay, because that history matters. If something is wrong, correct it rather than deleting it; if you think a record truly shouldn't exist, ask before removing anything.

Treat what you see as confidential. The CRM holds personal and sensitive information that people have trusted CBM with. Use it only for your CBM work, and don't share what you see beyond the people who need it.

When in doubt, ask. You won't break anything by asking. If you're unsure where something goes, whether a record already exists, or whether to make a change, check with **Sharon Rose** or your coordinator before guessing.

In short. Keep information current, put it where it belongs, search before creating, correct rather than delete, keep it confidential, and ask when unsure.

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