

Your Clean Data Checklist

Understand how your data got dirty, create a clean-up strategy and keep it clean in the future



Dirty data is everywhere. According to Forbes, 84% of executives are concerned about the quality of the data that they're basing their decisions on and Gartner measures the average financial impact of poor data on businesses at \$9.7 million per year.

In the association and nonprofit sectors, resources are limited and every dollar counts. Bad data can hurt your reputation, result in missed opportunities for engagement and reduce your organization's revenue. While data quality issues are practically inevitable, good data hygiene can help you understand how bad information gets into systems, identify common causes of bad data and create a clean-up strategy.



Understand How Your Data Got Dirty

While the way in which data is collected may be part of the cause for poor quality information, think through these questions to prioritize cleanup efforts:



What data fields are you collecting?

Required data fields can vary across organizations, but your team should monitor and assess these regularly to ensure that you are collecting the right information. Consider if you are asking too much information – for example, a landline phone number for constituents increasingly unlikely to have one in their home?



How can you simplify data collection?

Creating a wide selection of drop downs may have the best of intentions, from inclusion to faster data entry, but they can also create complexity. For example, a user may have options to enter a cell phone, iPhone or mobile phone number.



How are you keeping track of people that move?

Should you engage an automated service to obtain contact information for members and donors you've lost touch with over the years? Addresses change all the time and there may be no way to recover them without the help of a third-party address finder.



Are there underutilized or misused areas of the database?

Your data is invaluable, but is it useful? Whether you're using workarounds to capture data in places other than the 'intended' areas of a database or incorporating new modules, this is always a good question to ask. Any database add-ons should be coupled with cleanup efforts to ensure consistency.



Creating a Clean-Up Plan

Bad member data can be inaccurate, inconsistent and duplicative. It can be something as small as selecting the wrong state or misspelling a name. But knowing is half the battle. With an understanding of the issues you're dealing with and why they happened, the cleanup process can begin. Consider these steps to get the ball rolling:

Merge duplicate records

Duplicate records weighing your database down? It's easy to understand how duplicate records make their way into a database. Maybe a constituent created multiple accounts via your website or perhaps changes their name to reflect a life event. Third-party companies can help review and consolidate records.

Update addresses

With duplicates removed, it's time to make sure your records are accurate. According to the U.S. Census, more than 15 percent of Americans, or roughly 35 million people, move annually – some more frequently than that. Leverage a proactive service like NCOA to keep information up to date.



Update employment information

According to the [Bureau of Labor and Statistics](#), the average person will hold 11 jobs from the ages of 18 to 44. Employee data is difficult to keep updated, with revisions being a largely manual exercise. Prioritize high-value business contacts in your data cleanup efforts.



Prevent bad data from getting into your systems

Knowing where to look for "bad" data can keep it from becoming a problem in the future. If data is being imported in bulk, take time to address how to improve quality at the point of the import or sync. Do you have checks in place to catch bad quality after each data import?



Keep it Clean

Once you've made the decision to remove the bad data in your system, schedule a monthly or quarterly audit of your data. While this can be time-consuming, it's crucial to guarantee the accuracy and reliability of an organization's data. And once you have a plan in place, revisit your strategy and overall approach to data collection and maintenance often to ensure that it's working for you and your team.



About Personify

Personify is the market-leading Constituent Management and Engagement (CME) platform that empowers modern organizations to better engage their constituents, maximize revenue and optimize operations. For over 20 years, we have been driving growth for a diverse group of organizations including organizations, nonprofits, event professionals, YMCAs and JCCs. For additional information, visit www.personifycorp.com.



Want to learn more about how Personify can help you maximize the value of your data?

[Request a Demo](#)



© 2020 Personify, Inc. All Rights Reserved.

personifycorp.com