



Data Hygiene Guide

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The Importance of Good Information – and Where to Find it

It's a common horror story, a shared nightmare passed around nonprofit circles, among fundraisers and membership professionals alike. The appeal you've worked so hard on, be it a solicitation for a year-end gift or a call to renew membership, sent with care to a constituent...who is recently deceased.

While an extreme example, these embarrassing scenarios happen more often than you might think. Or maybe you've sent a direct mail campaign with no response or worse, returned because your contact no longer lives at the address. Perhaps you've made a call to a prospective donor or member only to discover they just talked to someone else on your team (and politely told them no).

Why do these mistakes happen? More often than not, they're due to bad information.

Dirty data is everywhere. In your personal life, you might send Christmas cards or emails only to have a handful return unopened. Ever synced your mobile device to more than one computer? Your phone may have duplicate contacts (or LOTS of duplicate contacts). Worse, maybe you've reached out to the Director of Membership at your trade association's top client to wish them a happy birthday only to find out they retired last April.

Yet we accept it, at home and at work. **When marketers were asked by Sirius Decisions¹ about the quality of their own data:**

25%

reported the average database's records were inaccurate

60%

rated their data health as unreliable

80%

weren't confident in their phone contact records

According to the Forbes Insights² and KPMG "2016 Global CEO Outlook," 84 percent of CEOs are concerned about the quality of the data they're basing their decisions on. **Gartner measures the average financial impact of poor data on businesses at \$9.7 million per year.**

Data Health and Nonprofits

In the nonprofit sector, where resources are limited and every penny counts, the potential financial impact of bad information is catastrophic but poor data can also lead to higher-risk decision making. The world of "big data" requires an increased emphasis on information health to provide cutting-edge, memorable experiences for members and donors. But Experian³ polled numerous businesses about their data woes, and the findings were alarming - 89 percent of U.S. executives believe their inaccurate data is undermining a good customer experience.

Like their commercial sector peers, the data collected by nonprofits can either be a gold mine of useful information or wholly inadequate. Gleaning insights from good data can help a nonprofit stay up and running with limited resources, or better yet, make impactful strides towards fulfilling its mission. When collected and stored properly, data can answer questions about performance, provide insights about constituent behavior, and most importantly, inform critical decision making across the organization.

Additional benefits include:



Boosting Staff Productivity

Instead of spending time validating and fixing data errors, high-quality data empowers staff to focus on their core mission.



Compliance

In industries where regulations govern relationships or trade, good-quality data can be the difference between compliance and millions of dollars in fines.



Improved Marketing

Better data enables more accurate targeting, personalization and communication across any and all channels.

Problems with data quality are inevitable but data hygiene can be managed through an understanding of how bad information gets into systems, the types of issues most often at the root of data problems, a strategy for cleaning up bad information and a plan to ensure data quality remains high.

What makes data bad?

Understanding the origins of low-quality information in an organization used to be simple. One system – a CRM, donor management system or AMS – worked behind the scenes to power activities across a nonprofit, from personal interactions to digital outreach. A recent study by Nonprofit Hub⁴ suggests 90 percent of nonprofits reported they are collecting data, but a surprising 49 percent stated they *didn't know how data was being collected*. In recent years, there has been more complexity in the number of interconnected technologies working to power an association, charity or health and wellness organization's operations. However, the causes of poor data quality remain largely unchanged.

INACCURATE DATA

INFORMATION HAS BEEN ENTERED
INCORRECTLY OR HAS NOT BEEN
MAINTAINED

Return to sender – address unknown. Or perhaps the address is correct, but members of a household have changed, a contact has changed jobs or a phone number has been updated. Even if your outreach efforts have moved from traditional direct mail pieces to digital emails, phone calls or text messages, the risks of data that's not up-to-date remain the same: wasted time, wasted money and wasted energy.

INCONSISTENT DATA

DATA FIELDS ARE MISSING OR
FORMATTED DIFFERENTLY ACROSS
RECORDS

Boulevard or Blvd.? Data inconsistency occurs between files when similar data is kept in different formats, for example the type of location (Street, Avenue) is abbreviated in one and spelled out in another. As a result, these files might duplicate personal data such as addresses and names and lead to decreased database performance.

DUPLICATE DATA

A SINGLE CONTACT OR ACCOUNT
THAT OCCUPIES MULTIPLE RECORDS IN
ONE DATABASE

More than any other type of data issue, duplicate records are the most pervasive nuisance for most modern nonprofits. For example:

- A member receives a notice to renew their membership online and visits your website.
- Unable to remember their password and unwilling to wait for an automated message inviting them to set a new one, they create a new account and complete their transaction.

Many systems would recognize this transaction as a new member, particularly if the email address was different. But what if their name and mailing address were the same? Now the member is receiving multiple communications – follow-ups on why they've chosen not to renew or receiving new member packets when they've been with your organization for years.

Getting on the Path to Data Health

The case for data hygiene is clear and the reasons behind poor quality information are understood. But the ongoing maintenance required to keep constituent information fresh and relevant can feel like a never-ending chore. Dun & Bradstreet reports⁵ data decays at an average rate of 2 percent per month, meaning as much as 25 to 30 percent of your organization's contact data can go bad each year under normal circumstances.

Data management plays an indispensable role in constituent acquisition, engagement and retention. Hygiene projects shouldn't be relegated to large technology updates or shifts in an organization. Smaller changes can help you make meaningful progress towards the goal of getting your database to where it should be.



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Understand How Your Data Got Dirty

In her popular book, *The Life Changing Magic of Tidying: A Simple, Effective Way to Banish Clutter Forever*, Japanese author Marie Kondo suggests the only way to eliminate the overwhelming mess many of us find ourselves in is to understand how it began. While the way in which data is collected may be part of the cause for poor quality information, **other questions can help prioritize cleanup efforts:**



WHICH FIELDS ARE REQUIRED? ARE THEY THE RIGHT FIELDS?

Required fields vary across organizations but should be monitored regularly. Are you an organization heavily invested in social media? Are constituents required to share their Twitter handle or LinkedIn profile or do you only require their phone number? On the other side of the coin, are you demanding too much information – for example, a landline phone number for constituents increasingly unlikely to have one in their home? Are people plugging junk into those fields just to move forward with their transaction?

CAN CODES OR ATTRIBUTES BE STREAMLINED?

Introducing 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 or staff member may have options to enter a cell phone, iPhone or mobile phone number.

HAVE YOUR CONSTITUENTS MOVED?

Do you need to consider engaging an automated service to try 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 AREAS OF THE DATABASE THAT ARE UNDERUTILIZED OR MISUSED?

Your data is invaluable but is it useful? Whether workarounds are used to capture data in places other than the 'intended' areas of a database or incorporating newly implemented modules, this is always a good question to ask. Any database add-ons or module implementations should also be coupled with cleanup efforts to move historical data into their proper homes for reporting to always be consistent.

Creating a Clean-Up Plan

Bad member data can be inaccurate, inconsistent and/or duplicative. It can be something as small as selecting the wrong state (for example, Tennessee's TN versus Texas's TX), misspelling a name, not accurately capturing a constituent's communication preferences or incorrectly identifying their status with your organization.

But knowing is half the battle. With an understanding of the kind of data issues you're dealing with and why they happened, an effective cleanup of poor-quality information can begin. While the scope of a data hygiene project can vary based on the amount of data in review, the number of systems and a multitude of other variables, the following steps can help get the ball rolling.

DON'T GO IT ALONE – ASK FOR HELP

Resolving what may represent years of potential data issues can be overwhelming, yet many nonprofits remain reluctant to ask for help for fear of taking resources away from other programs. Many cost-effective tools are available to help, and professional advice can help avoid additional mistakes resulting from the human error of a well-intentioned, manual database cleanup.

MERGE DUPLICATE RECORDS

Duplicate records weighing your database down? It's easy to understand how duplicate records make their way into a nonprofit's database. Maybe a constituent, as noted above, creates multiple accounts via your website or perhaps changes their name to reflect a life event. Third-party companies can help with data services to review records and consolidate them on a large scale.

UPDATE ADDRESSES

With duplicates removed, it's time to start making sure the records you do have 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. Running a proactive service like NCOA

can be infinitely more cost (and time!) effective than researching manually via Google and/or personal directory websites.

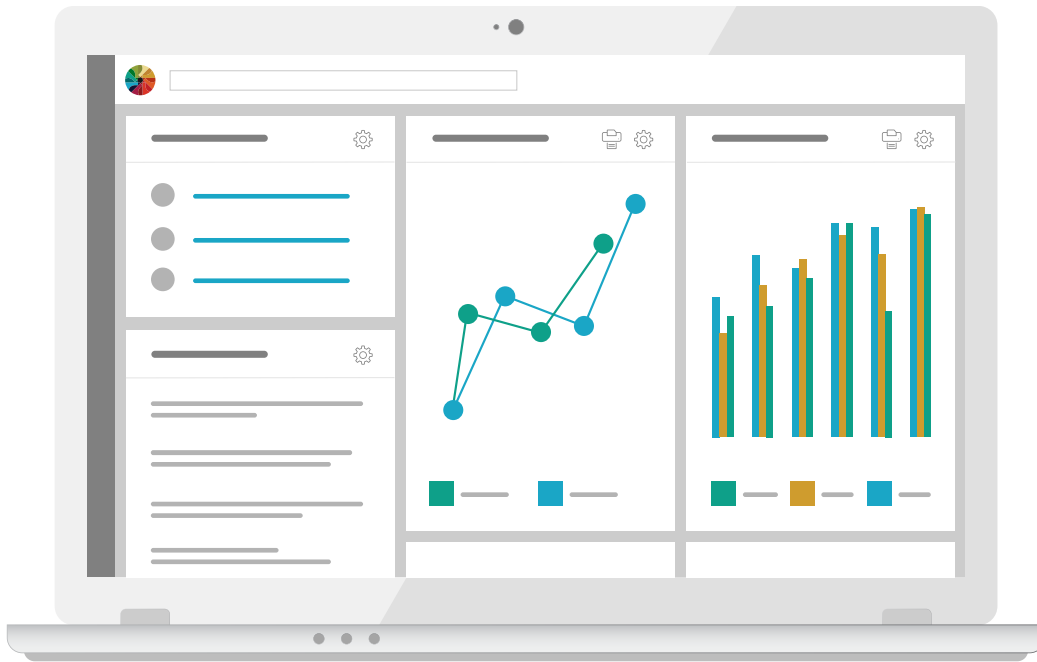
UPDATE EMPLOYMENT INFORMATION

This is especially true for professional societies and associations. Did you know that, according to the Bureau of Labor and Statistics⁶, the average person will hold 11 jobs from the ages of 18 to 44. And, according to Dun & Bradstreet⁷:

- A new business opens every minute
- A new business files for bankruptcy every 8 minutes
- A business closes every 3 minutes
- A CEO changes every minute
- A company name change occurs every 2 minutes

Changing roles and employee data represent some of the most difficult information to keep up-to-date, with revision of this information a largely manual exercise. Understand and identify your high-value business contacts, and segment and prioritize them in your data cleanup efforts.





PREVENT BAD DATA FROM GETTING INTO YOUR SYSTEMS

Knowing where to look for "bad" data is an effective tool to help keep it from becoming a problem in the future. Databases often have multiple input sources which, over time, can become common culprits of collecting bad data. If data is being imported in bulk, take time to address how to improve quality at the point of the import or sync. Are there checks in place as or after data is imported to catch bad quality? Does the import process need tweaking to accommodate for changes you're continually making to records once they've already been added to your database?

Keep it Clean

Once you've made the decision to remove the bad data in your system, you should schedule a regular audit of your data. This can be a monthly or quarterly check-up, but don't leave it to be an annual project. You can accumulate a lot of data in a year, and it's better to examine it on a regular basis so you and your staff don't find yourself in the same place again.

Data cleanup can be time-consuming and cause tremendous headache for nonprofit data managers, but the work is very much necessary to guarantee the accuracy and reliability of an organization's data. Once you have a plan in place to clean up your database, the best thing you can do to prevent a massive cleanup effort in the future is to revisit your strategy and overall approach to data collection and maintenance.

How We Can Help

It's about working smarter, integrating your data streams and workflows in ways that make sense for your organization and your constituents.

Managing interoperability of systems and data is complex and presents challenges for even the most technology-savvy organization. When you have questions, you need a single source of truth. A lens on your entire ecosystem supporting insights, enriched data and – a unified experience for your constituents. When the quality of your data isn't where it should be, that visibility is limited.

With over 20 years of experience serving nonprofits, Personify brings our rich background in partnering with organizations to understand their unique needs and data streams to help demystify new technologies and to put them to work for associations, nonprofits and health and wellness organizations. Our consulting team can help lead projects to determine the root causes of poor data quality and introduce best practices to stop bad data in its tracks. Our Personify360 solution comes out of the box with features to help staff work with data in a way that's designed to both drive productivity and consistency. And our integration platform as a service (iPaaS), Personify Hub, seamlessly connects systems to enrich data without compromising its quality.

Integrated systems. Optimal Results. Learn more about how Personify can help you maximize the value of your data.

[LEARN MORE](#)

About Personify

Personify is the market-leading Constituent Management and Engagement (CME) platform that empowers nonprofit organizations to better engage their constituents, maximize revenue and optimize operations. For over 20 years, Personify has served as the technology foundation for organizations of all sizes from the largest associations, charities, YMCAs and JCCs to emerging nonprofits. Nearly 25 percent of the U.S. population interacts with Personify through their involvement in nonprofit organizations. For additional information, visit www.personifycorp.com.



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