

ASK GENIUS

• WEBINAR

Cleaning Your Donor Database – A Practical, Step-By-Step Guide

Hosted by:
Austen Brown
& Nic Prenger

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PSG
PRENGER SOLUTIONS GROUP

Fundraising Consulting
Annual Appeal Management
Raiser's Edge Database Administration
Fundraising Automation



Clarke

BOYS & GIRLS CLUE OF AMERICA

Arthritis Foundation

HEALTH

CHATTANOOGA AREA FOOD BANK

OSU

Together We Transform Lives
TEAMMATES
MENTORING

RONALD McDONALD HOUSE CHARITIES

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BENEDICTINE COLLEGE
ATCHISON, KANSAS

KU THE UNIVERSITY OF KANSAS

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403287
Mr. Nic Prenger
9810 Westchester Dr
Omaha, NE 68114-3858



Yes, I want to help more students receive a Catholic education!

\$100 \$250 \$500 \$1,000 Other \$ _____

I have enclosed a check (made payable to Seeds of Hope)

Charge my credit card

NAME AS IT APPEARS ON CARD (PLEASE PRINT)

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ASKGENIUS[®]
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Friday at 8pm CT

If Creighton makes the Elite 8

50% off

For new AskGenius subscribers

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ASKGENIUS[®]
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Sunday at TBD

If Creighton makes the Final Four

75% off

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Must attend a demo before Friday tip-off



Public Demo
*This Thursday
11:00 a.m. CT*



Private Demo
*Book one of the
remaining spots*

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Agenda

- Importance of Clean Data
- How to Start
- Areas to Focus On
- Real-World Data Maintenance Projects
- Automate Your Data Clean-up!

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The importance of **clean data**

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Data Hygiene

- The process to ensure data is clean
- Data is clean when it is without errors
- Examples of “Dirty Data”
 - Errors/Inaccuracies
 - Duplicates
 - Redundant Tracking
 - Inconsistent Data Entry

Preferred Address : Home
Country: United States More...
Address lines: 10501 Clifa Hollow Dr
City: Oklahoma City
State: OK Oklahoma
ZIP: 73162-1201 DPC:

Action Status
Long Description
Closed
Completed
Continuous
Finished
Not Completed
Open
Pending

Spouse
Solicit code: Do not mail

Attribute category: <All Categories>
Category: Communication Preferences Description: No Mail

Telephone Numbers Email Addresses Links Fax Numbers
DNC Type Address Primary?
Email cbaldwin123@gmail.com

Biographical
Last name: Hernandez Aliases
First name: Carmen
Middle name:
Titles: Mrs.
Suffixes:
Nickname: CAMI

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Benefits of Clean Data

1. Improved Data Quality
2. Improved Decision Making
3. Improved Segmenting/Targeting
4. Improved Efficiencies
5. Improved Cost Savings

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Where to **focus** your attention



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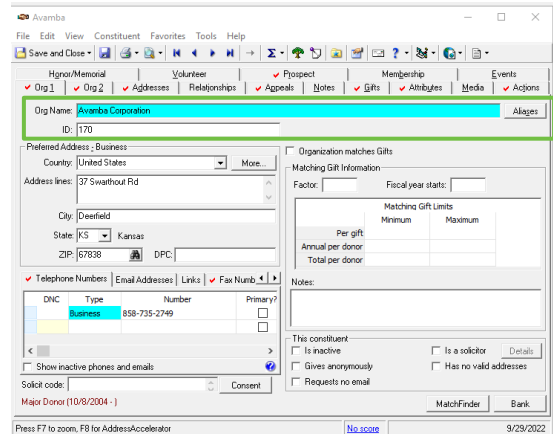
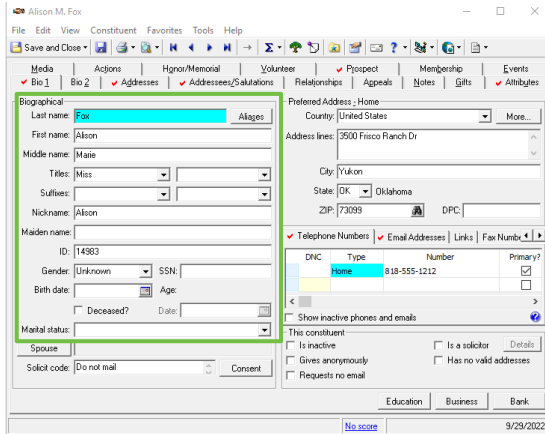
Complete a Data Assessment

- Look for patterns of redundancy, errors, etc.
- Review data for common entry mistakes
- Review records missing required fields or donor metrics
- Look at all types of records within the system
- Review areas with a high level of use

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Areas with a High Level of Use

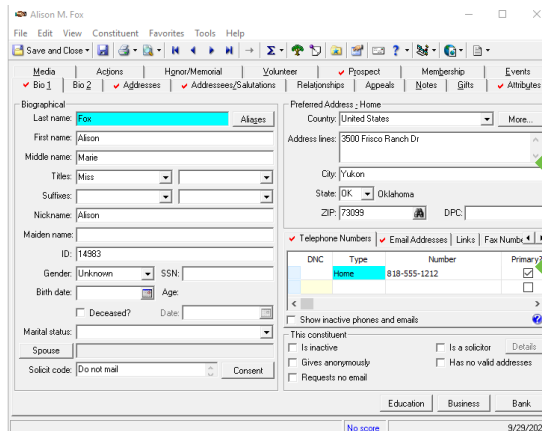
- Biographical Data



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Areas with a High Level of Use

- Contact Information



Preferred Address

Phone Numbers & Emails

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Areas with a High Level of Use

- Tracking Options

Consent/Solicit Codes →

Disqualifiers ←

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Areas with a High Level of Use

- Addressee/Salutation

Primary Add/Sal →

Additional Add/Sal ←

Type	Address/Salutation	Editable?
Informal Salutation	Alison	<input type="checkbox"/>

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Areas with a High Level of Use

- Gift History/Tracking

The screenshot shows a software window titled "New Gift for Alison M. Fox". The interface includes a menu bar (File, Edit, View, Gift, Favorites, Tools, Help) and a toolbar. Below the toolbar, there are tabs for "Gift", "Miscellaneous", "Soft Credit", "Matching Gifts", "Tribute", "Attributes", and "Split Gift". The "Gift" tab is active, showing a form with the following fields:

- Constituent: Fox, Alison (ID: 14983)
- Gift type: Cash (highlighted with a green box)
- Gift subtype: [Blank]
- Gift date: 9/29/2022
- Amount: \$2,500.00
- Campaign: AnnualAppeal2022
- Fund: Campaign Fund
- Appeal: CW22
- Package: [Blank]
- Solicitors: [Blank]
- Pay method: Personal Check (with an "EFT?" checkbox)
- Bank: [Blank]
- Reference: JMD James Fox
- Acknowledge: Not Acknowledged
- Letter: Annual Giving Thank (with a "Benefits" button)
- Receipt: Not Received
- Receipt amt./no.: \$2,500.00
- Check no./date: 12345 / 9/28/2022

At the bottom of the window, it says "Date added:" and "Press F7 to zoom" with a date of 9/29/2022.

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Establish a Standard for Data Entry

- Review the results of your data assessment
- Set a Data Entry Standard (start with Constituent Records)
- Save the document in a central location for staff to utilize
- Things to consider when setting a new standard:
 - Is it beneficial to track data in this way?
 - Is this redundant to an existing tracking area?
 - How difficult will this be to maintain over time?

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Review Current and Historical Data

- Review new data weekly/monthly
 - Does the data match your data entry standard?
 - Pay attention to error patterns
- Review historical data to match standard

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Run Data Appends Regularly

- AddressAccelerator*
- Address Finder*
- Age Finder
- Credit Card Updater*
- Deceased Finder*
- Email Finder
- Phone Finder

**Favorite data appends*

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Data maintenance examples

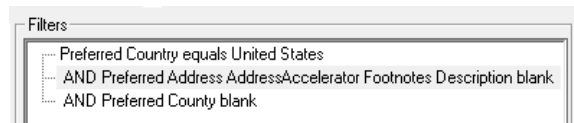


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20 Queries I Look at Every Week

Constituent Query

1. Any additions made to records by users
2. New constituents added by NXT
3. Blank address with NVA unchecked
4. Country is blank on Addresses
5. Address not validated, missing County



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20 Queries I Look at Every Week

Constituent Query

6. Primary Add/Sal are blank
7. Constituents missing informal Add/Sal
8. **Recently deceased constituents**
9. Review tribute record descriptions
10. Constituent code is blank

Filters

- Deceased Date equals This calendar yr
- AND Constituent Date Last Changed equals Last week

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20 Queries I Look at Every Week

Constituent Query

11. Preferred Name field is blank
12. **Emails with common typos**
13. Hard Bounced emails still active
14. Required attributes missing on record
15. Opportunities without a linked gift

Filters

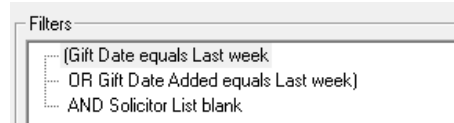
- Phone Type one of E-Mail, E-Mail 2, E-Mail 3, E-Mail 4, EmailFinder
- AND Phone Number not blank
- AND (Phone Number contains gmail.
- OR Phone Number contains .comm
- OR Phone Number contains .rog
- OR Phone Number contains hotmail
- OR Phone Number contains hotmail
- OR Phone Number contains icloud
- OR Phone Number contains @ail.com
- OR Phone Number contains gmail.com
- OR Phone Number contains gmail.com
- OR Phone Number does not contain @
- OR Phone Number contains mial.com
- OR Phone Number contains .cmo
- OR Phone Number contains @oal.com
- OR Phone Number contains @omcast.net
- OR Phone Number contains .)
- AND Phone Comments does not contain Valid Email

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20 Queries I Look at Every Week

Gift Query

- 16. Gifts without tracking attributes
- 17. Unacknowledged gifts/HM Tributes
- 18. Credited solicitor/s on recent gifts



Participant Query

- 19. Event Registrations missing a linked gift

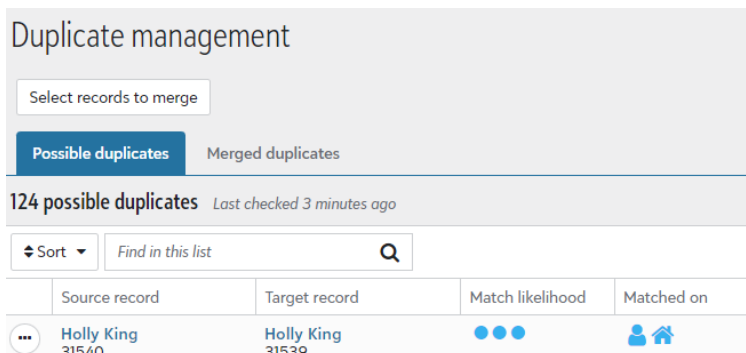
Action Query

- 20. Actions not assigned to a fundraiser

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Review and Merge Duplicate Records

- Utilize existing tools to locate, review, and merge duplicates



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Data Mining within a Const Record

- Compare the credit cardholder field against a constituent's recorded name on the Bio1/Org1 tab
- Aids in locating/comparing duplicates and ensuring Gifts are on the correct constituent record

The image shows a credit card form at the top with fields for Pay method (Credit Card), Card type (American Express), Cardholder (James S. Fox), and Card no./exp. (12/2024). Below it are two biographical forms. The left form has Last name: Fox, First name: Jay, Middle name: (empty), Titles: Mr., Suffixes: (empty), and Nickname: (empty). A green arrow points to the right form, which has Last name: Fox, First name: James, Middle name: S., Titles: Mr., Suffixes: (empty), and Nickname: Jay.

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Establish a Preferred Name Field

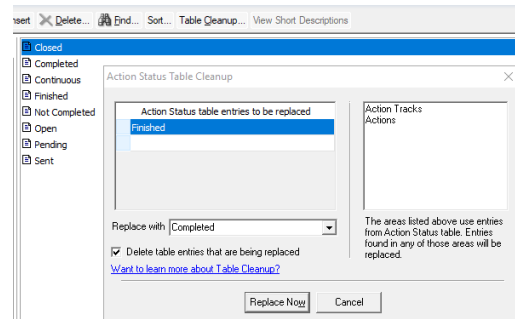
- Repurpose the Nickname field
- Reduces the number of Add/Sal formulas needed
- Lends itself well to how the field is displayed in Web View

The image shows two biographical forms. The left form has Last name: Fox, First name: Alison, Middle name: Marie, Titles: Miss, Suffixes: (empty), and Nickname: (empty). A green arrow points to the right form, which has Last name: Fox, First name: Alison, Middle name: Marie, Titles: Miss, Suffixes: (empty), and a new Preferred field containing Alison.

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Table Clean-up

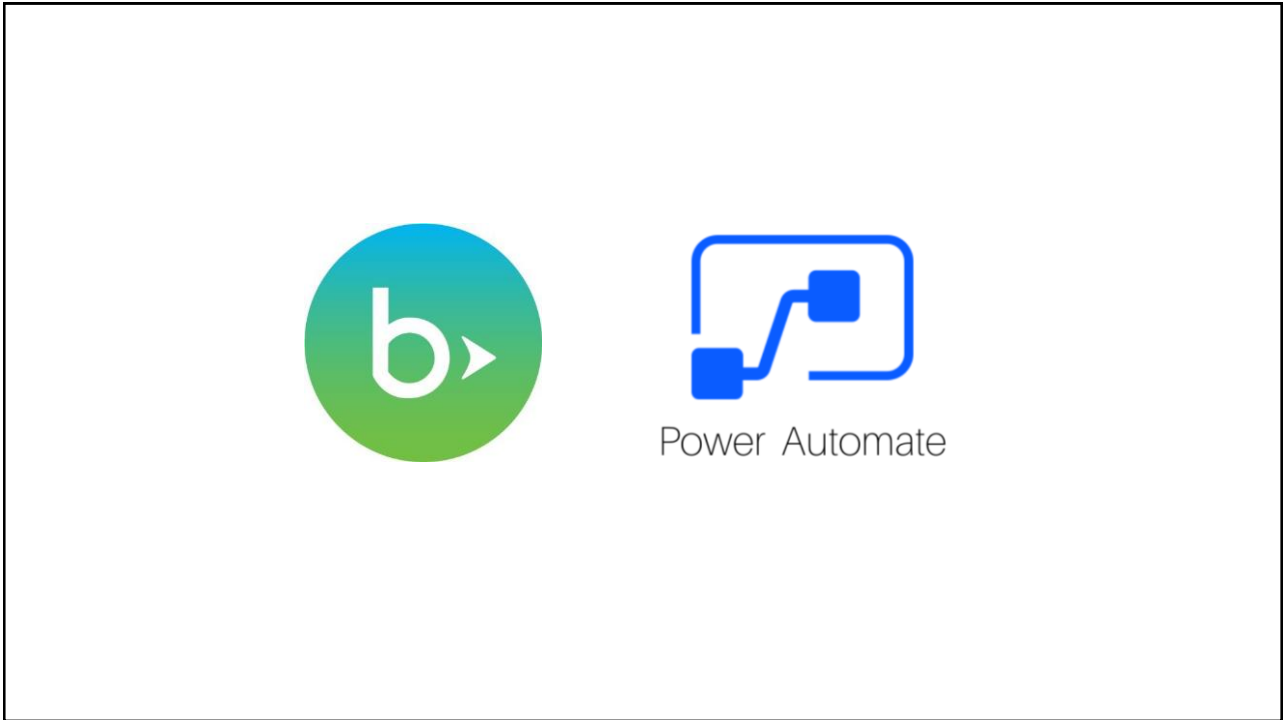
- Utilize the Table Cleanup Plug-in (Configuration)
- Enables data entry to be clean and consistent
- Easily reduces redundancy, removes errors and typos, etc.



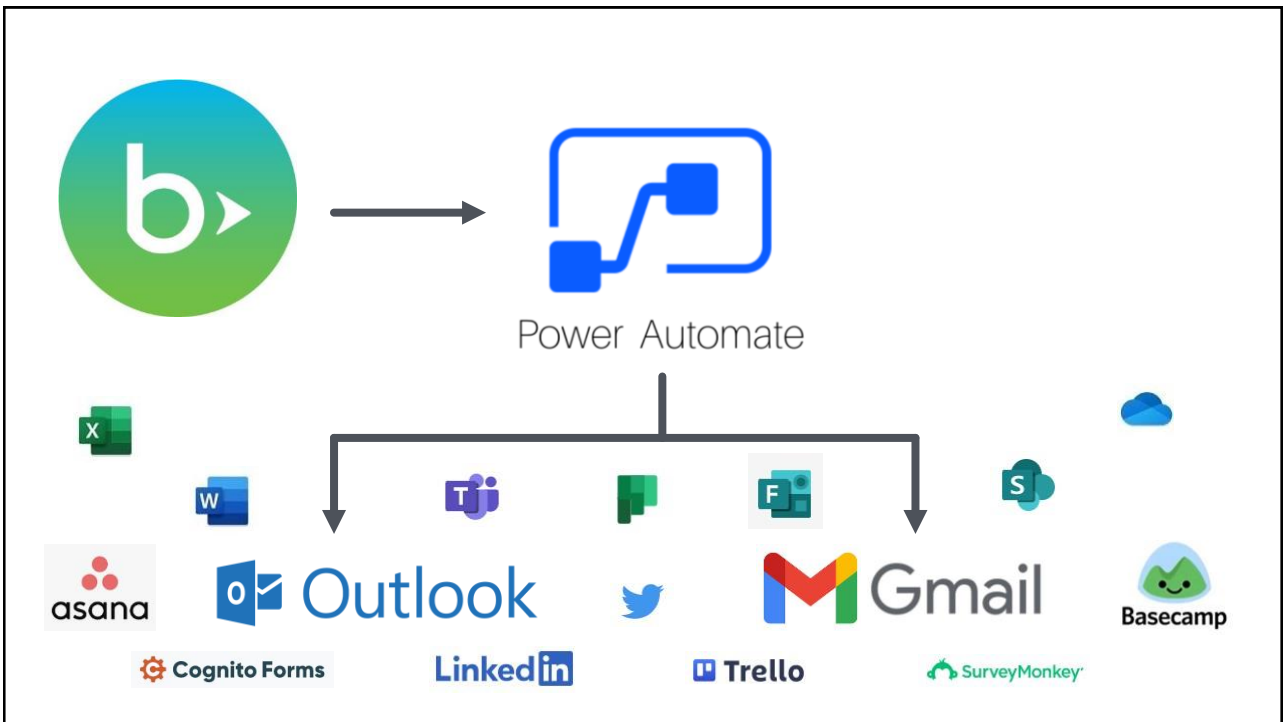
29

The power of automation

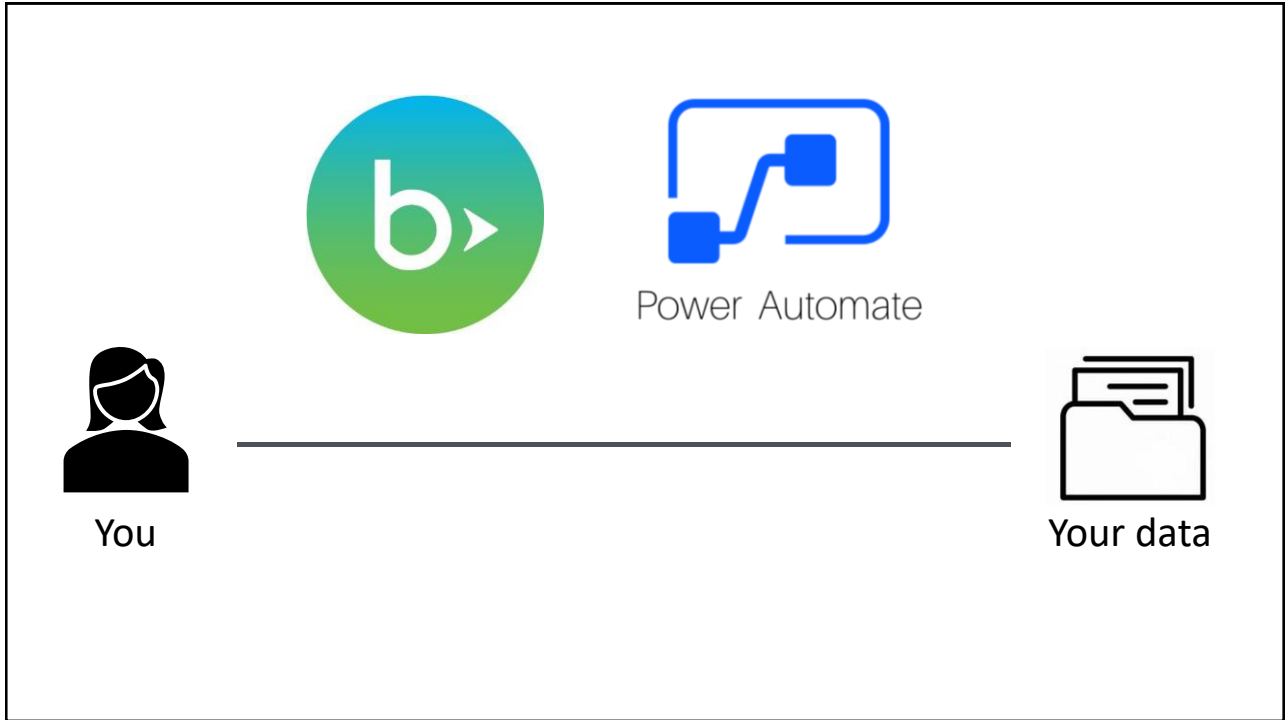
30



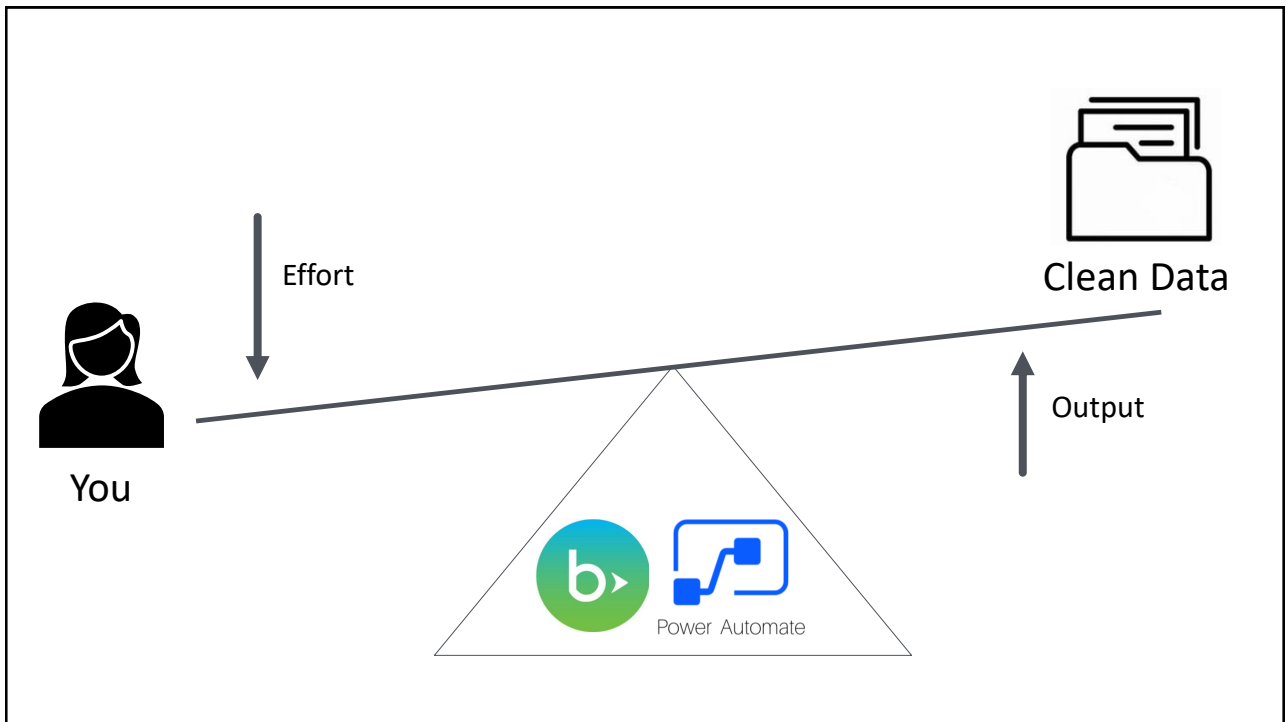
31



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Automation ideas to aid with data clean-up

1. Alert when duplicate constituents are created
2. Automatically fill in blank 'preferred' name/nickname fields
3. Mark emails/phones as primary
4. Validate new emails, and alert when email is invalid
5. Allow non-privileged users to submit a record change
6. Update consent records from info in constituent emails
7. Mark records with a blank address as 'No Valid Address'

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Automation ideas to help with gift processing

1. Automatically run donor acknowledgement letters
2. Provide an email supplement to year-end tax letters
3. Bring data directly from an online census form into RE
4. Alert when a large gift from an unassigned donor is rec'd
5. Alert staff when an opportunity has an upcoming ask date
6. Alert a gift officer when a portfolio donor makes a gift
7. Automatically tag giving circle/society members

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AUTOMATE GENIUS

BY PRENGER SOLUTIONS GROUP

Scan the QR Code or visit the link.

PSG can help you delight your donors,
streamline your gift processing and raise
more money!



Automategenius.com

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Questions & Answers

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