

**ASK GENIUS**

• WEBINAR

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

Hosted by:  
Austen Brown  
& Nic Prenger

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PRENGER SOLUTIONS GROUP

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

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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)

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11:00 a.m. CT*



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*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

**Action Status**

- Long Description
- Closed
- Completed
- Continuous
- Finished
- Not Completed
- Open
- Pending

**Spouse**

Solicit code: Do not mail

**Attribute category: <All Categories>**

| Category                  | Description |
|---------------------------|-------------|
| Communication Preferences | No Mail     |

**Preferred Address : Home**

Country: United States More...

Address lines: 10501 Clifa Hollow Dr

City: Oklahoma City

State: OK Oklahoma

ZIP: 73162-1201 DPC:

**Telephone Numbers** | Email Addresses | Links | Fax Numbers

| DNC | Type  | Address               | Primary?                            |
|-----|-------|-----------------------|-------------------------------------|
|     | Email | cbaldwin123@gmail.com | <input checked="" type="checkbox"/> |

**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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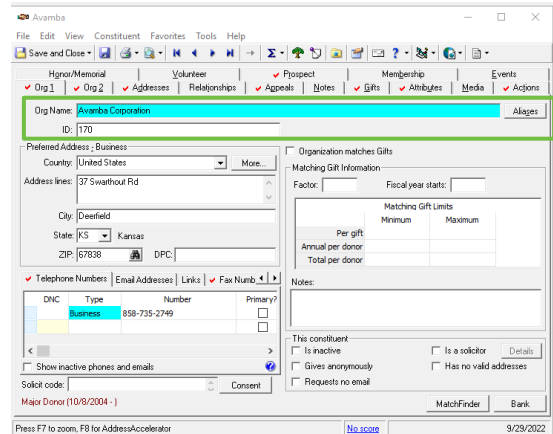
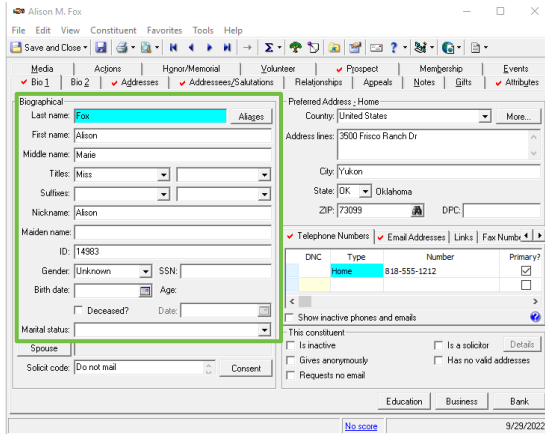
### Complete a Data Assessment

- 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

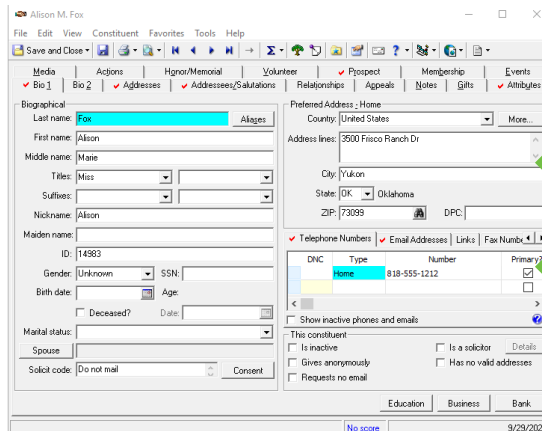
- Biographical Data



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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

The screenshot shows the constituent profile for Alison M. Fox. The 'Consent/Solicit Codes' field is highlighted with a green arrow, showing a dropdown menu with 'Do not mail' selected. The 'Disqualifiers' section is also highlighted with a green arrow, showing checkboxes for 'Is inactive', 'Is a solicitor', 'Gives anonymously', and 'Requests no email'. Other fields include 'Last name: Fox', 'First name: Alison', 'Middle name: Marie', 'Titles: Miss', 'Suffices:', 'Nick name: Alison', 'Maiden name:', 'ID: 14883', 'Gender: Unknown', 'SSN:', 'Birth date:', 'Marital status:', 'Spouse:', and 'Solicit code: Do not mail'. The 'Preferred Address - Home' section shows 'Country: United States', 'Address lines: 3500 Frisco Ranch Dr', 'City: Yukon', 'State: OK Oklahoma', and 'ZIP: 73099'. The 'Telephone Numbers' table shows a 'Home' number '818-555-1212' with a 'Primary?' checkbox checked.

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# Areas with a High Level of Use

- Addressee/Salutation

The screenshot shows the 'Addressee/Salutation' section of the constituent profile for Alison M. Fox. The 'Primary addressee:' field is set to 'Miss Alison M. Fox' and the 'Primary salutation:' field is set to 'Miss Fox'. Below this is a table titled 'Additional Addressees and Salutations' with columns for 'Type', 'Address/Salutation', and 'Editable?'. The table contains one row: 'Informal Salutation' with 'Alison' as the address/salutation and an unchecked 'Editable?' checkbox. A green arrow points to the 'Primary Add/Sal' field, and another points to the 'Additional Add/Sal' table.

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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 with icons for Save and Close, navigation, and printing. 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: (empty)
- Gift date: 9/29/2022
- Amount: \$2,500.00
- Campaign: AnnualAppeal2022
- Fund: Campaign Fund
- Appeal: CW22
- Package: (empty)
- Solicitors: (empty)
- Pay method: Personal Check (with an "EFT?" checkbox)
- Bank: (empty)
- 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

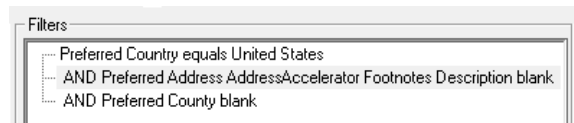


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## 20 Queries I Look at Every Week

### 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

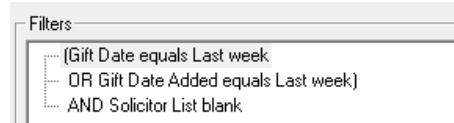
- ..... Phone Type one of E-Mail, E-Mail 2, E-Mail 3, E-Mail 4, EmailFinder
- ..... AND Phone Number not blank
- ..... AND (Phone Number contains gmail.
- ..... OR Phone Number contains .comm
- ..... OR Phone Number contains .rog
- ..... OR Phone Number contains hotmail
- ..... OR Phone Number contains 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

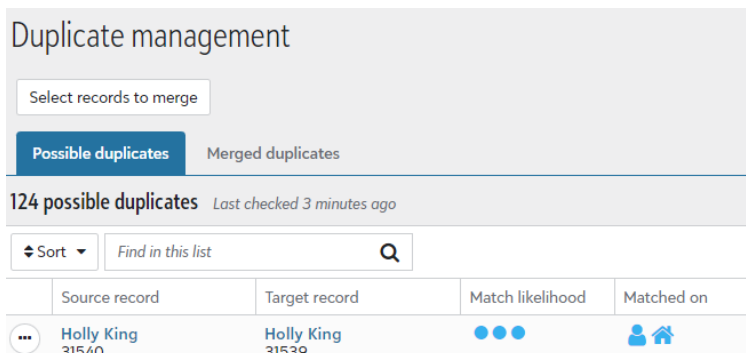
### Action Query

- 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

Pay method: **Credit Card**  EFT? Card no./exp.:  12/2024   
 Card type: American Express  Auth. code:   
 Cardholder: James S. Fox  
 Date added:

Biographical  
 Last name: **Fox**   
 First name: Jay  
 Middle name:   
 Titles: Mr.   
 Suffixes:   
 Nickname:

Biographical  
 Last name: **Fox**   
 First name: James  
 Middle name: S.  
 Titles: Mr.   
 Suffixes:   
 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

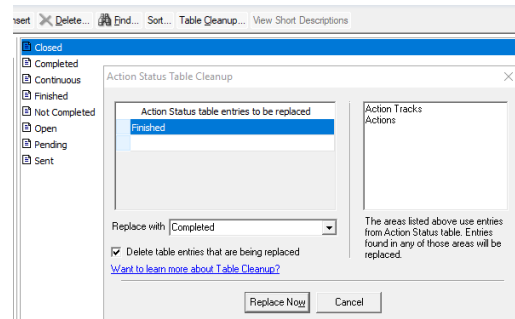
Biographical  
 Last name: **Fox**   
 First name: Alison  
 Middle name: Marie  
 Titles: Miss   
 Suffixes:   
 Nickname:

Biographical  
 Last name: **Fox**   
 First name: Alison  
 Middle name: Marie  
 Titles: Miss   
 Suffixes:   
 Preferred: **Alison**

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## Table Clean-up

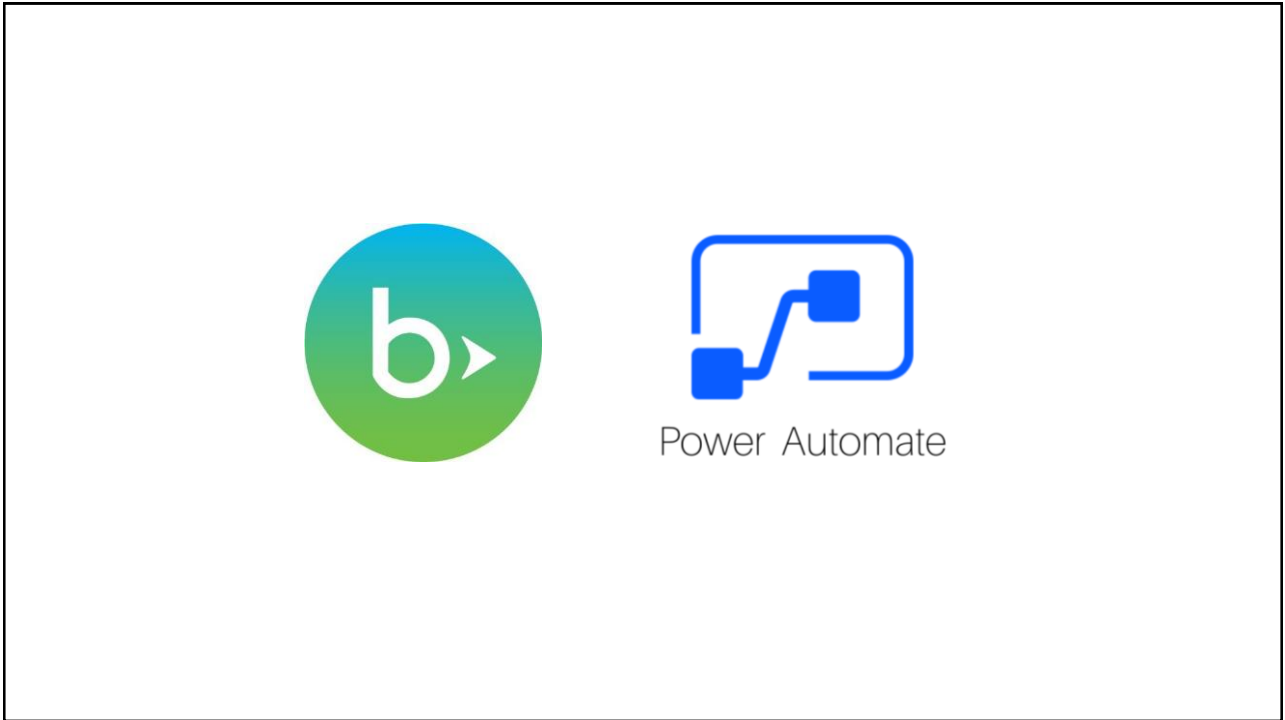
- Utilize the Table Cleanup Plug-in (Configuration)
- Enables data entry to be clean and consistent
- Easily reduces redundancy, removes errors and typos, etc.



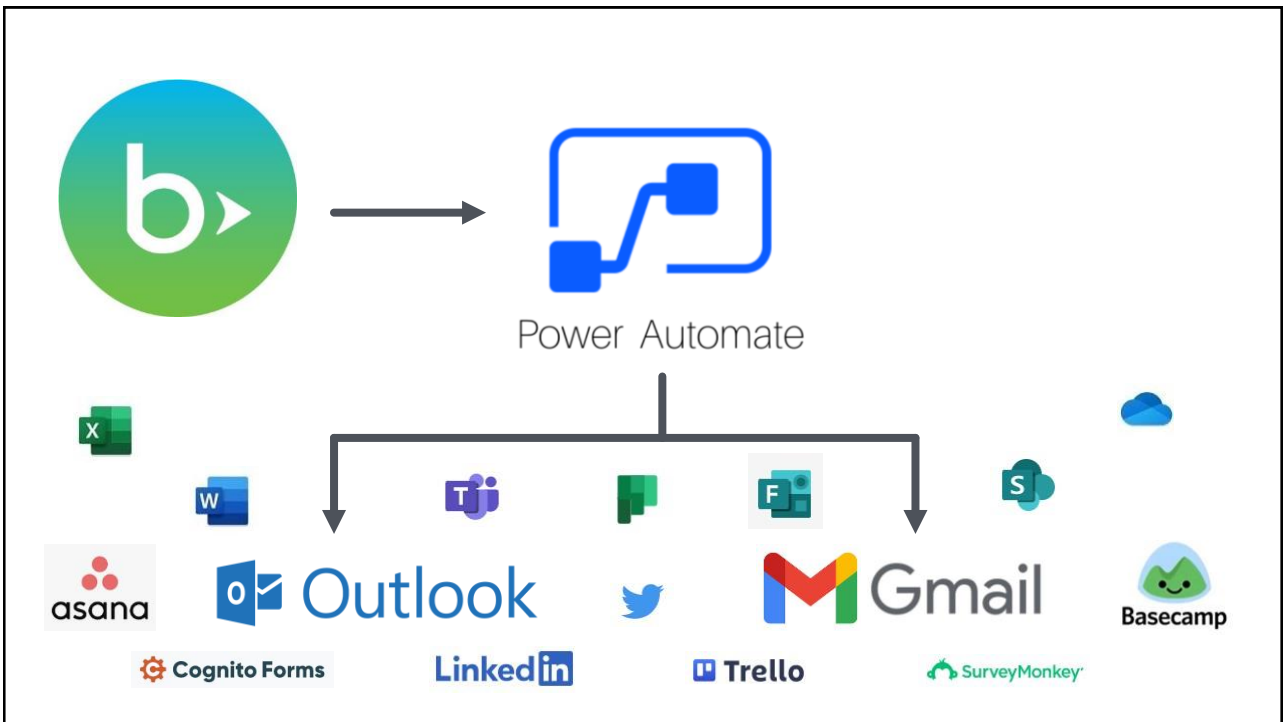
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The power of automation

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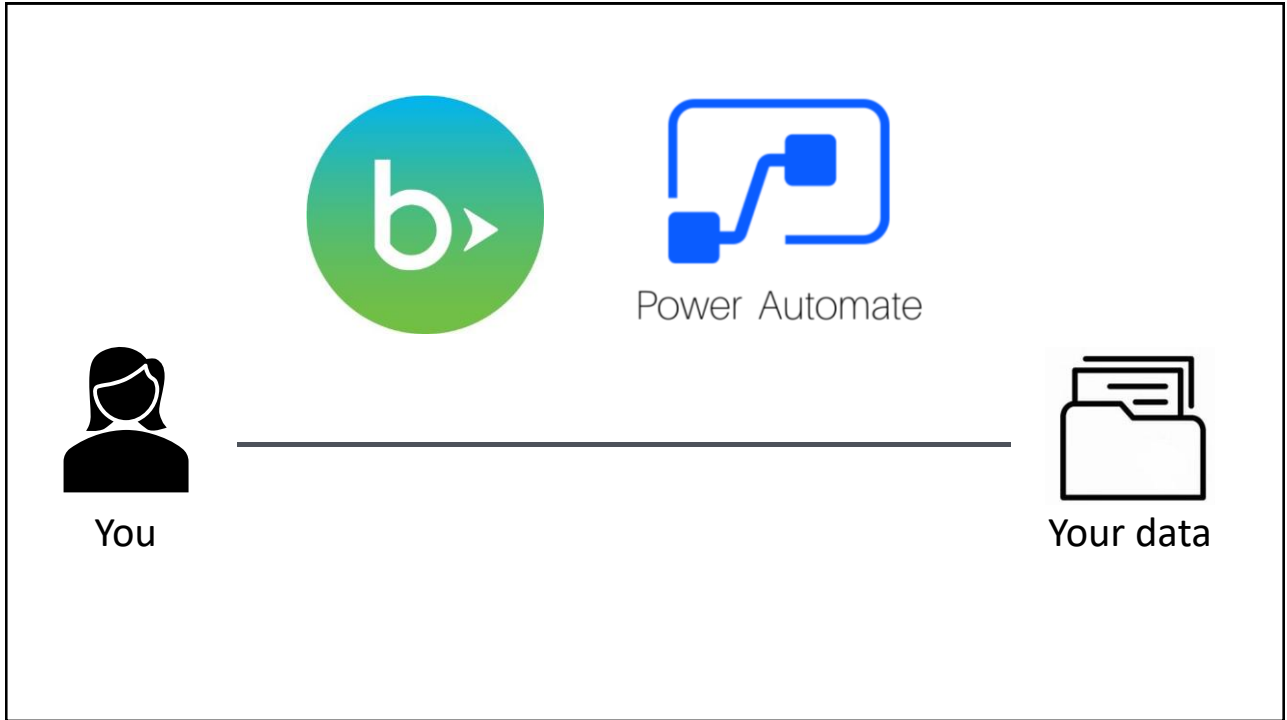


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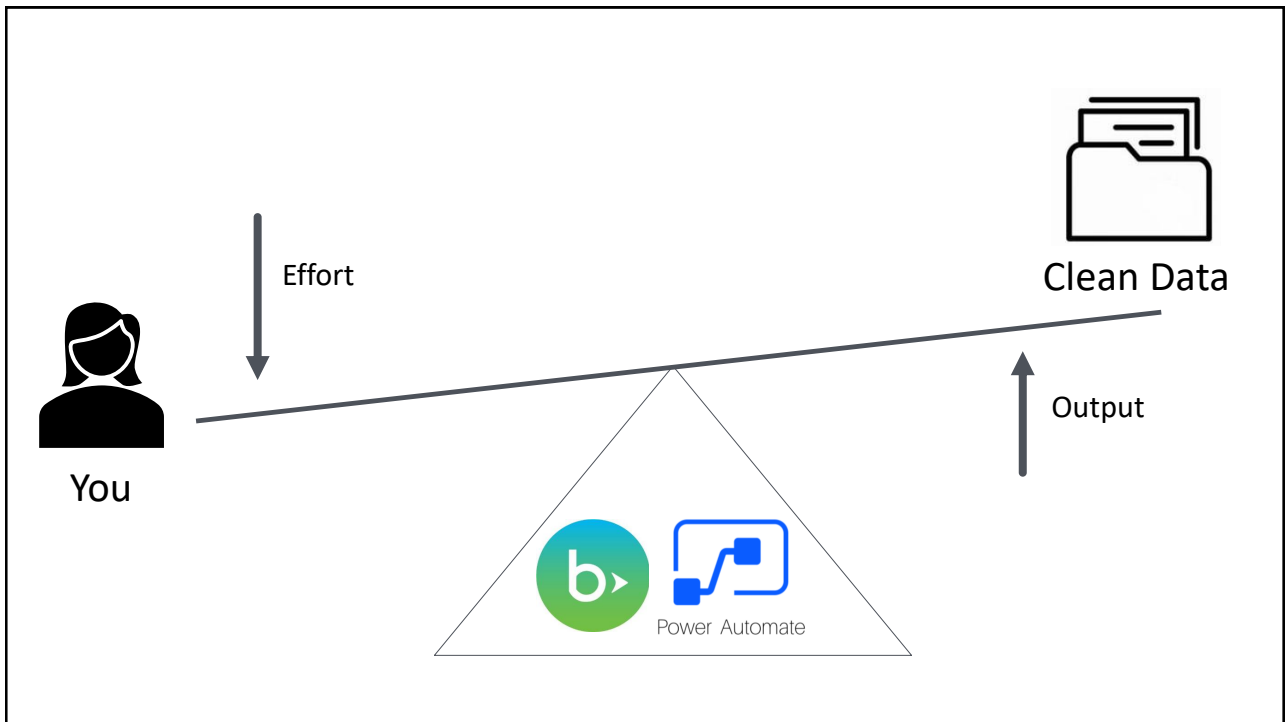


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## Automation ideas to aid with data clean-up

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

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



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# Questions & Answers

**.||PSG**

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**.||PSG**

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