1

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

2

3

Friday at 8pm CT

If Creighton makes the Elite 8

50% off

For new AskGenius subscribers

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Sunday at TBD

If Creighton makes the Final Four

75% off

For new AskGenius subscribers

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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!

7

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

Benefits of Clean Data

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

Where to focus your attention

PSG

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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
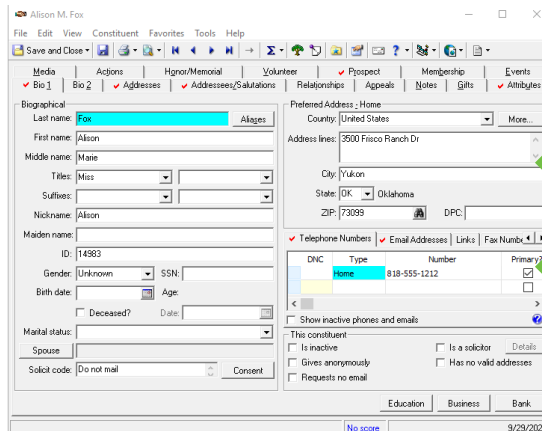
Areas with a High Level of Use

- Biographical Data
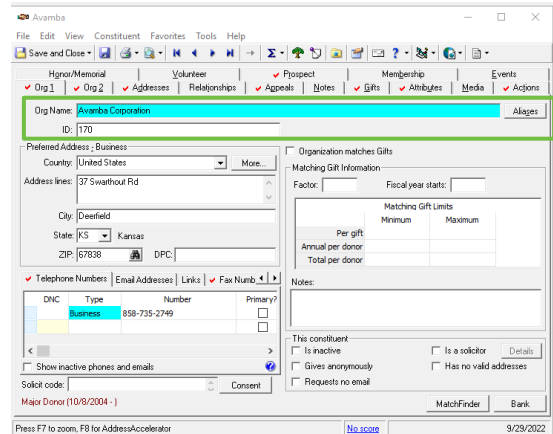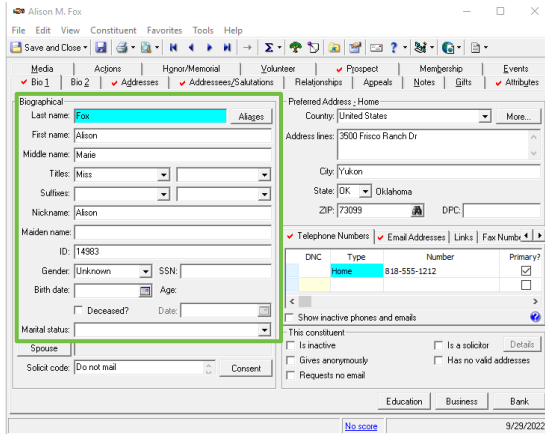
13

Areas with a High Level of Use

- Contact Information

Preferred Address

Phone Numbers & Emails

14

Areas with a High Level of Use

- Tracking Options

Consent/ Solicit Codes

Disqualifiers

15

Areas with a High Level of Use

- Addressee/Salutation

Primary Add/Sal

Additional Add/Sal

16

Areas with a High Level of Use

- Gift History/Tracking

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?

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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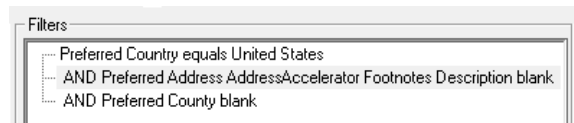## 20 Queries I Look at Every Week

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

Filters
- Preferred Country equals United States
- AND Preferred Address AddressAccelerator Footnotes Description blank
- AND Preferred County blank

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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. <mark>Recently deceased constituents</mark>
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

20 Queries I Look at Every Week

Constituent Query

11. Preferred Name field is blank
12. <mark>Emails with common typos</mark>
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 gnail.
OR Phone Number contains .comm
OR Phone Number contains .rog
OR Phone Number contains hoitmail
OR Phone Number contains hotnail
OR Phone Number contains jcloud
OR Phone Number contains @ail.com
OR Phone Number contains gmai.com
OR Phone Number contains gmaijl.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

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
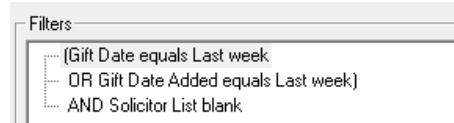
Participant Query

19. Event Registrations missing a linked gift

Action Query

20. Actions not assigned to a fundraiser

Filters

- (Gift Date equals Last week
- OR Gift Date Added equals Last week)
- AND Solicitor List blank

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Review and Merge Duplicate Records

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

Duplicate management

Select records to merge

Possible duplicates | Merged duplicates

124 possible duplicates *Last checked 3 minutes ago*

Sort ▾ | Find in this list

	Source record	Target record	Match likelihood	Matched on
...	Holly King 31540	Holly King 31539	●●●	👤🏠
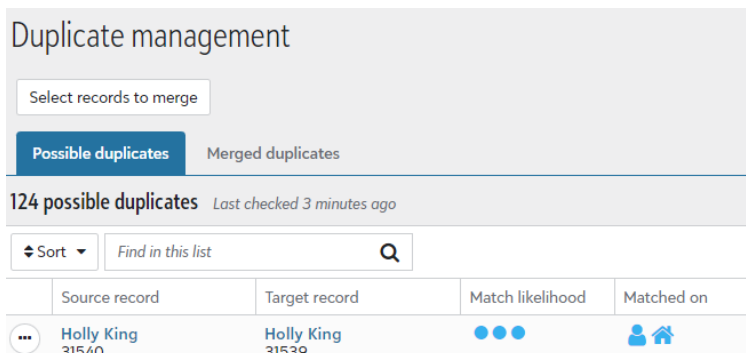
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Data Mining within a Const Record

- 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

Establish a Preferred Name Field

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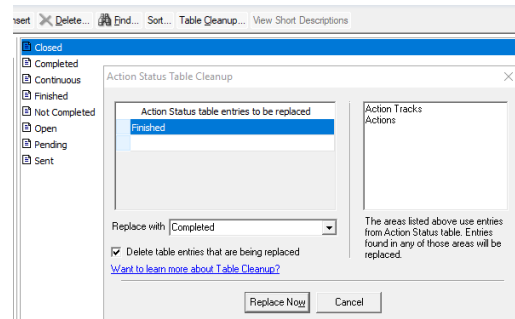- Lends itself well to how the field is displayed in Web View
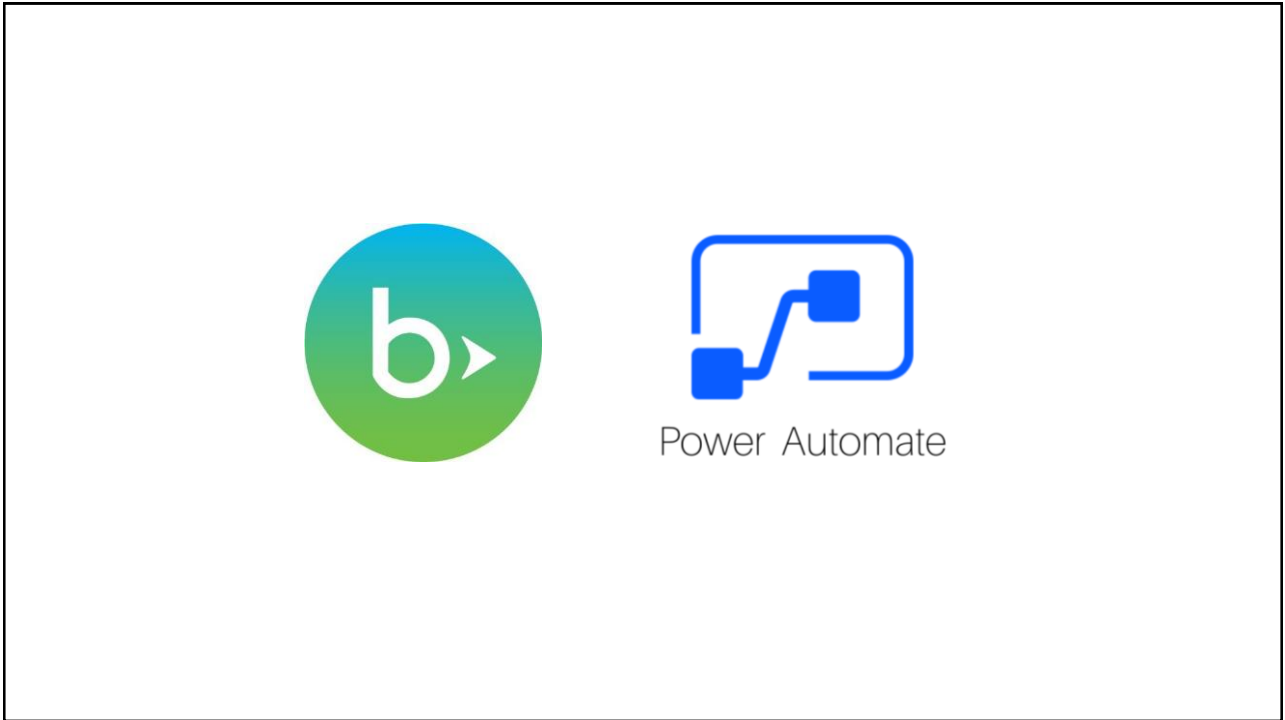
Table Clean-up

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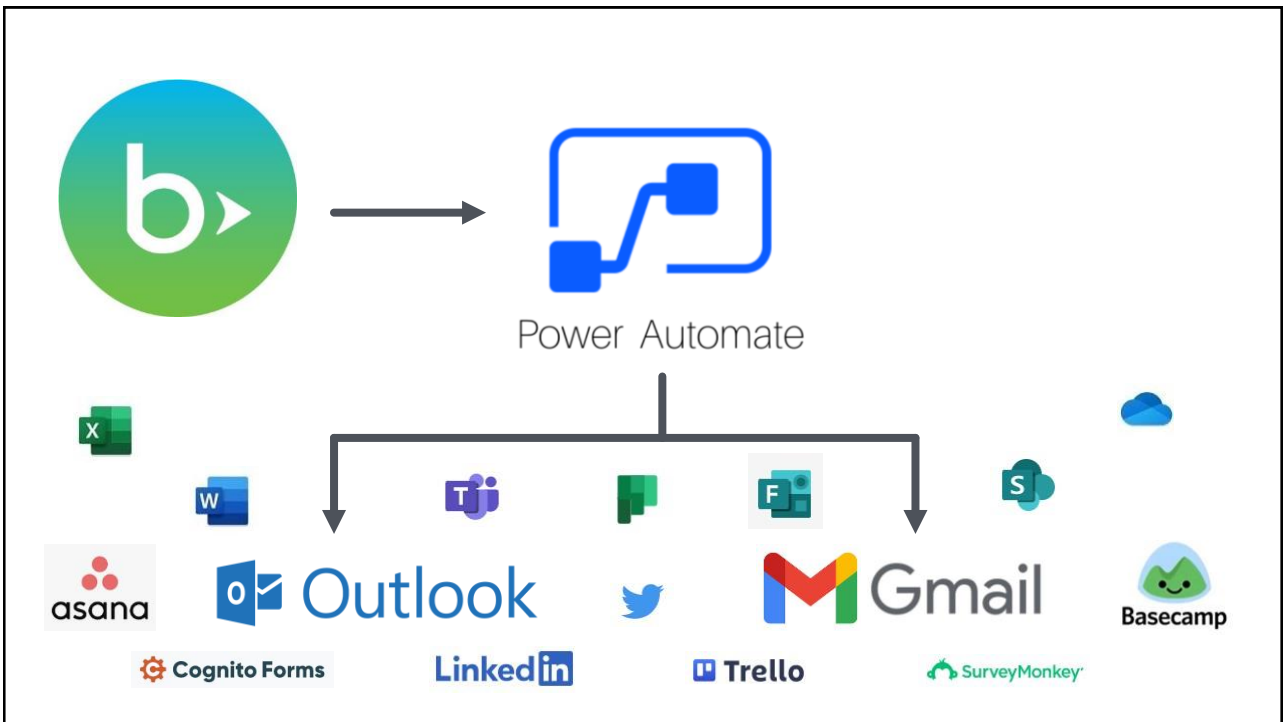- Easily reduces redundancy, removes errors and typos, etc.

The power of automation

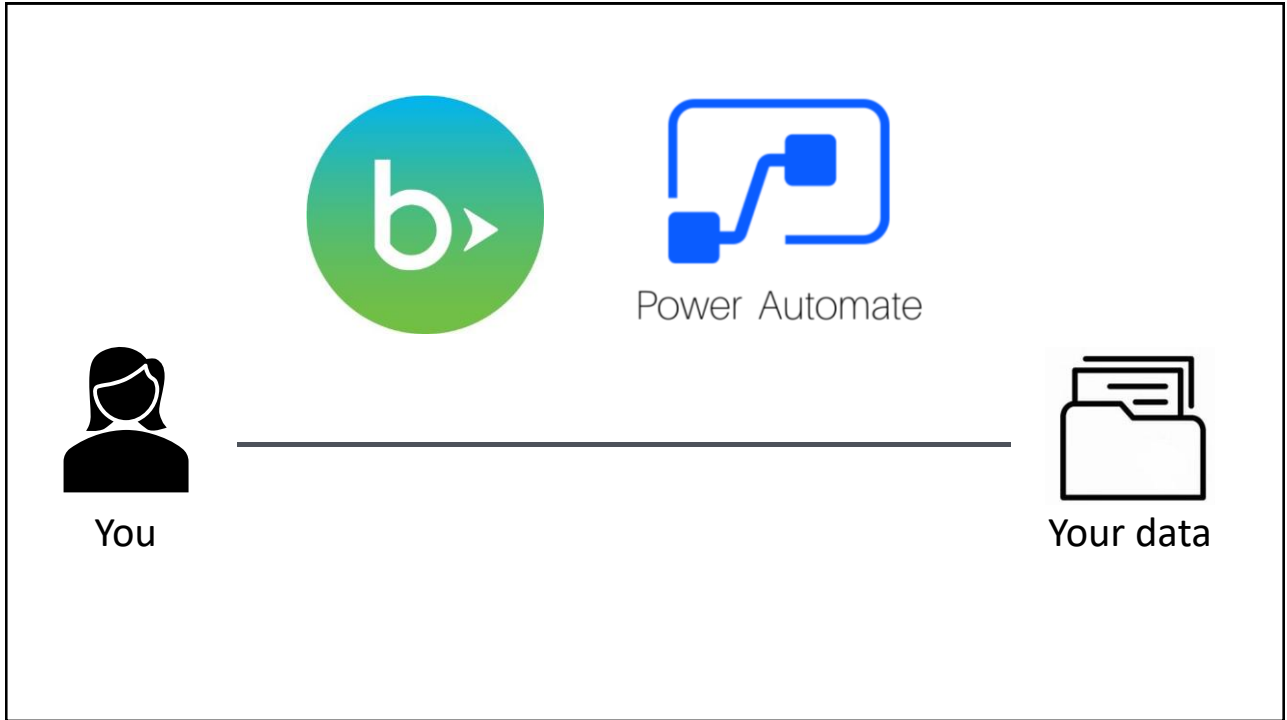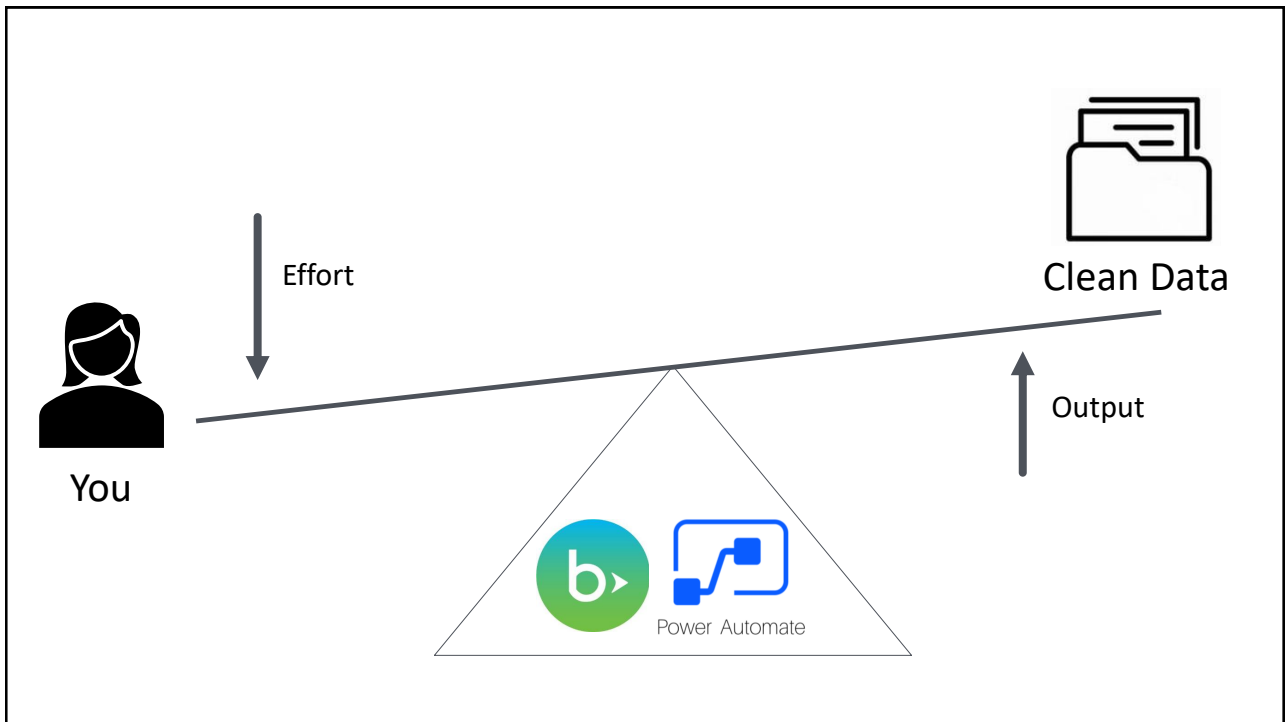**.ılPSG**

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You

Power Automate

Your data

Effort

Clean Data

You

Output

Power Automate

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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'

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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Questions & Answers

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