

# KEEPING YOUR DATA TIDY

**Tips and Tricks to stay organized**

# BAD DATA HAPPENS

#1 Reason - Bad data entry - either via Platform, Check-in, portal, etc

#2 Reason - Migration left-overs (aka: bad data entry in old system)

**Don't see the "Fix" views - make sure you are a part of the "Data Quality Team" User Group**

# BEST PRACTICES

- **Have a CLEAR and DISTINCT minimum data requirement.** Without a minimum data requirement it is hard to keep track of who is who.
- **Gather Birthdates.** Birth date is the one piece of information about a person that does not change. If you can grab that at registration, on info cards, etc you can keep duplicates at bay.
- **Make cleaning data a habit.** Take some time every week to look for a fix bad data.
- **Teach your users good data practices.** Ensure that they are searching twice, ensure that they are double checking their data entry before hitting save.
- **Review Form Responses.** Ensure that someone is reviewing information collected on form responses. This is often the first time you will find out about a new phone, email or home address.

# TAG BAD DATA MAGNETS

- **Create processes to alert you or another appropriate staff member when certain changes to data occur:**
  - A Name changes (Did someone get renamed or married?)
  - An Address changes - Are there other households who may have also moved?
  - A Marital Status changes - Are there people who should be added/removed from the household.
  - A Contact or Participant Status Change
- **Use View Notifications:**
  - A list of all new Contact records from the day before
  - A list of all new Donor records from this week
  - A list of all new Participants added via checkin (checkin is often a high stress data entry point)

# CONTINUE TO BE A BAD DATA HUNTER

- **Always be on the lookout for Bad Data:** Be aware as you traverse through the system of any bad data and note the following:
  - What was it
  - When did it happen
  - Who did it
- **Write down your findings:** As you gather more bad data findings start noting the following:
  - Is there a pattern?
  - Is this a random issue?
  - Is this a major issue?
  - Is this a minor issue?
- **Reach out to your users depending on your findings:**
  - Consistant - Group training
  - Major - Individual or group training
  - Minor - send an email

# EXPAND YOUR TEAM

- **Find Volunteers** - Have your fellow staff mates be on the lookout for volunteers who are tech savvy and detail oriented
- **Train Volunteers** - Have food! Beyond that start with one tool or job per person or small group and then move out from there.
- **Encourage Your Volunteers** - Ensure to remind them how they are helping the cause
- **Reach out to your users depending on your findings:**
  - Consistent - Group training
  - Major - Individual or group training
  - Minor - send an email

# OTHER TIPS TOOLS

- **Partner with ministries that know about data changes:**
  - Wedding Coordinators
  - Singles Groups
  - College Groups
  - Widows Groups
  - Memorial Coordinators
- **Pay Attention and get your staff to pay attention to:**
  - Weddings
  - People moving or moving away
  - Funerals
- **Use Whitepages.com**
  - Look up phone numbers and it will tell you if they are home or cell phones
- **Use Melissa Data**
  - Use the address validator tool with a Melissa Data account