THE ULTIMATE CHEAT SHEET FOR SQUEAKY CLEAN DATA

BAD DATA wastes time and money, causes embarrassment, creates inefficiency, and breaks down trust. These things affect the most important thing you already know about data: Data represents people. With squeaky clean data, people aren't as likely to fall through those proverbial "cracks" (and that includes your staff, trying to manage a dirty database).

CLEAN DATA enables exceptional member care and insightful, predictive decision-making.

Enjoy our 9-point, full-spectrum crash course on getting and keeping squeaky clean data to make sure you're touching every step of the process.

Know Why You Keep Data
01

Knowing what you're going to do with your data will help you know exactly what kind of data to collect. Are you going to use it simply for contact information, or do you plan to do comprehensive reporting and data mining? What areas of growth, operations, and ministry will you want to be able to report on? Evaluating what you expect to learn from the data will set you on a course for success.

Create One Source for Data
02

Centralizing all information into a web-based database is like Tolkien's One Ring of Power, when it comes to ministry efficiency. Everything is in one place and that means other elements of church management, such as online registration, children's check-in, background checks, and online giving, can be connected to the same database. This is a must for meaningful reporting—and peace in your corner of the Kingdom.
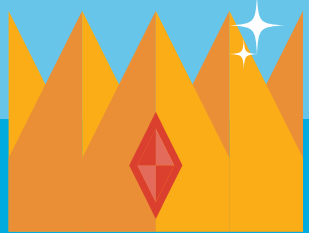
Get Senior Pastor Buy-In
03

Simply put, churches whose senior pastor insists on compliance with data integrity processes have better success maintaining data integrity and accurate reporting.

Make sure the folks who sell you church management software (ChMS) do the heavy lifting of moving your data into their system.
04

Some vendors suggest that your success with their product is dependent on your data being cleaned up first. The problem is that if you knew how to do this, you'd probably already be having success with your current system. **Experienced data experts should implement your data transitioning.**

Make sure those same folks teach your ministry leaders how to manage and protect their own data, with emphasis on:
05

- **Processes:** Best practices for data collection, labeling, entry, rights-management, security, and reporting
- **People:** Role-based recommendations and instruction
- **Technology:** System training and built-in configuration that eliminates many process-based issues

Bonus: Double success to you if they have a sandbox environment for you to play in before you go live.

Anoint a Data Champion
06

This person must be detail-oriented and willing to train all members of the ministry team on how to help keep their best ministry resource from becoming untrustworthy. If s/he can "sell" the benefits of clean data to ministry leaders by providing outstandingly insightful reports, all the better. (This person is so vital to your data strategy, you should probably consider getting s/he a crown, or something.) And did you catch that? You're going to need to…

Create a Data Strategy
07

Hopefully, your ChMS vendor will have supplied you with basic knowledge and suggested plans. In case your vendor didn't, here are four quick tips (we have lots more):

- **Be Systematic:** Your Champion should set-up and follow-through on a series of weekly, monthly, biannual, and annual checklists that s/he uses to regularly sweep the database.
- **Be Simple:** When setting up categories, go with simple, broad buckets, rather than intricate descriptions that nobody can remember (i.e. Restrict individual statuses to "member," "attendee," and "visitor"). Getting too specific actually contributes to bad data. Make sure all ministry leaders know the definition of your designations and use those—and only those—designations.
- **Be Accessible:** Keep a Google Doc accessible to everyone on staff where all data questions, updates, and member concerns (such as duplications, absent individuals, special needs) are recorded throughout the month.
- **Be Alert:** Avoid creating bad data with sloppy data entry, independent decision-making, and lack of accountability for who will act on data and by what deadline.

Every Data Champion Needs a Team
08

One (person in charge of all your data) is the loneliest number—and a bad idea. It takes the whole ministry teams' cooperation, plus a data team (a.k.a. "power users") representing the various ministries, to assist the Champion. This team will act on the aforementioned monthly Google Doc in a regularly scheduled discussion of needed updates. Often, this is where the folks who need ministry assistance are first identified.

Perform an Annual "Data Refresh"
09

No matter how good your strategy, data gets dirty all by itself because people move, get married, have babies, move again, get divorced…you get the picture. **Designate a "Data Refresh Month."** Ask every attendee to complete a form every weekend for 3 weekends. Make it fun. Serve "refresh"ments. Beg their forgiveness. Give out prizes. Whatever it takes. Assemble a temporary group of volunteers to process all the new data. Mass email an update/unsubscribe opp to everyone else. Delete non-responder files at end of campaign. It might hurt a little, but trust us, this is the best way to get the maximum number of updates.