

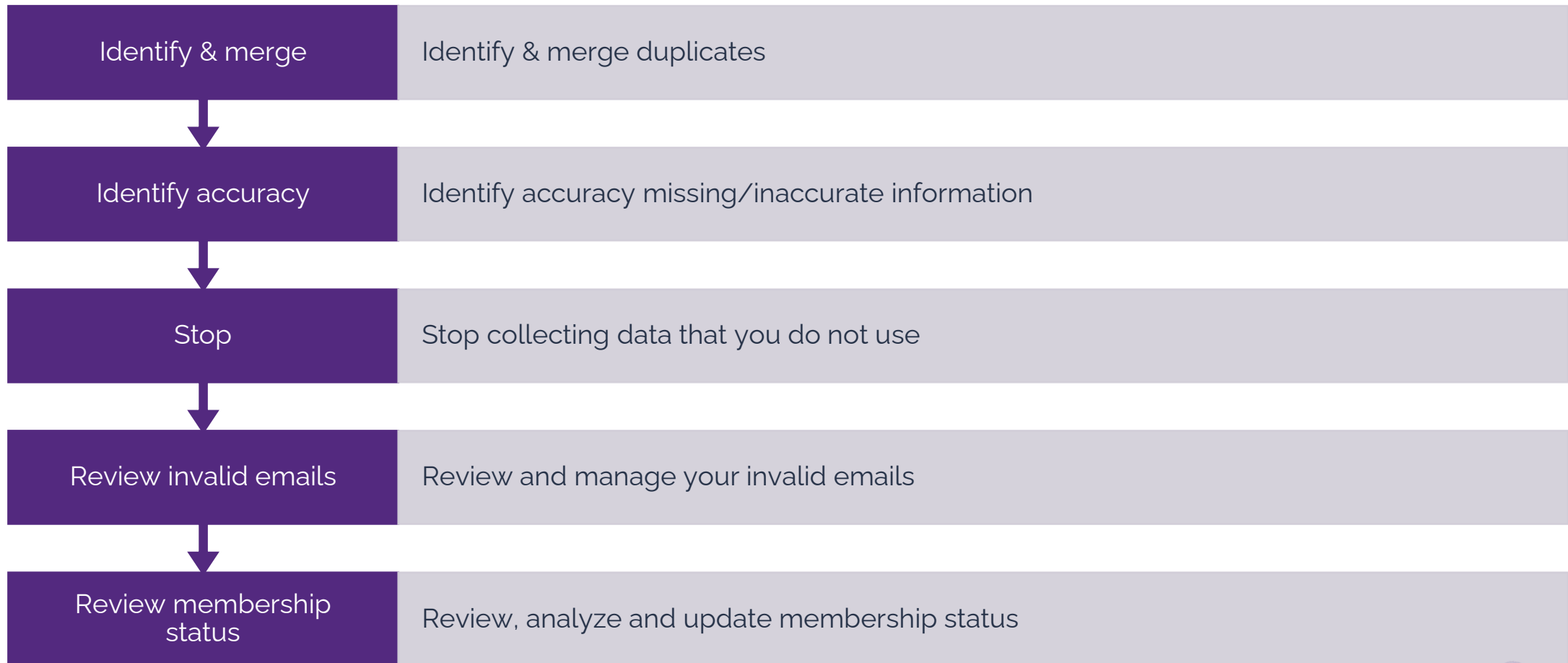
# Best Practices for a Healthy & Clean Database

# Clean Up “Dirty Data”!

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Dirty or bad data is **a record that’s duplicate, incomplete, outdated, irrelevant, or simply inaccurate**. For example: Irrelevant or outdated data could be records about a company that has since been acquired or about a person who has since changed their title or role.

# Clean Up Dirty Data



# Identify & Merge Duplicates

How did duplicates get into your database in the first place???

- ✓ You have not standardized how information is added into your system
  - ✓ Staff is not verifying that records already exist
  - ✓ Membership Application submitted where a prospect already exists in your database
  - ✓ Event Registrations not appropriately matched to existing contacts
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- TIP! Establish specific guidelines for how data is entered into your database. For example: Are abbreviations allowed? Should IBM be entered as IBM or International Business Machines

# Identify & Merge Duplicates

How to... Generate the Custom Member report and export to Excel. Use the Excel Functionality to identify duplicates. Use several pieces of identifying information (ie. Contacts may have the same name, but the email address could be different)

19	Anni's House	djohnson@mailinator.com	Dropped/Suspended	7/25/2017	
20	Anson County Chamber of Commerce		Dropped/Suspended	10/25/2017	
21	Anything I Want to Be		Dropped/Suspended	6/27/2017	
22	Around the World		Dropped/Suspended	7/31/2018	
23	Aubrie's Interiors	hi@mailinator.com	Dropped/Suspended	8/29/2017	
24	Baytown Resort	marks@mailinator.com	Dropped/Suspended	3/21/2019	
25	Bayview Motel		Dropped/Suspended	5/7/2019	
26	Be Fit	cjacobi@mailinator.com	Dropped/Suspended	3/14/2017	
27	Beautiful Blooms	beautiful@mailinator.com	Dropped/Suspended	9/12/2017	
28	Beautiful Home Remodeling	cheri.petterson@growthzone.com	Active	11/17/2020	Peter Mays
29	Berdinos	bernards@mailinator.com	Dropped/Suspended	7/25/2017	
30	Best Brew in Town		Dropped/Suspended	9/12/2017	
31	Best Company		Dropped/Suspended	11/7/2017	
32	Best Company		Active	9/26/2019	Joan Larsen

# Identify & Merge Duplicates

## Merge Duplicates

Generally the newest record should be retained, however, be sure to evaluate the records prior to merging

KB: [Merge Duplicates](#)

**Member - Merge**

**Best Company**

Only values that differ between the selected members will show up on the list below. Click on value you want to use for the final merged value from values for either **Best Company** or **Best Company**. The currently selected value is highlighted in green.

After the merge is complete, please use the Merge Selected Rep feature on the Reps tab to consolidate reps if needed. In addition, please review the Account, Advanced, and Marketing tabs to disable or delete any duplicate information if necessary.

	Source Record	Destination Record	New Destination Record
Field	Best Company (Created: 11/7/2017):	Best Company (Created: 9/26/2019):	Merged Value
<b>Contact Fields</b>			
Primary Phone	(604) 123-4567		
<b>Physical Address Fields</b>			
City	Baxter	Crosby	Crosby
Address Line 1	876 Graggre Lane		
Postal Code	87654	56441	56441
<b>Mailing Address Fields</b>			
City		Crosby	Crosby
Country	US		
Postal Code		56441	56441
State/Province		MN	MN
<b>Display Fields</b>			
Display Primary Phone	(604) 123-4567		
Lodging Vacancy Service	None	ChamberMaster	ChamberMaster

# Identify Incomplete/Inaccurate Data

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Use your reports to find missing data in your records. This may be a daunting task so focus on...

- Information needed to interact with your members
- Information important to providing a great member experience
- Information needed for board reports
- Information needed for event invitations

# Identify Incomplete/Inaccurate Data

When adding a new record make sure you have all the information you need to create new record. If you are using the Membership Application ensure that you are gathering the minimum information needed to have a complete record

The screenshot displays a web-based membership application form for a member named "A Place for Dogs". The form is organized into tabs at the top: General, Reps, Web, Communication, Account, Stats, Benefit Tracking, Advanced, Marketing, Files, and Tasks. The "General" tab is active, showing the member's name and a "Sign in as this Member" link. Below the name are "Save", "Cancel", and "Merge Into..." buttons. A section titled "Contact Information" is expanded, revealing various input fields. The "Company Name" field contains "A Place for Dogs". The "Primary Phone" field has "(218) 546-5413", and the "Alternate Phone" field also has "(218) 546-5413". The "Toll-Free Phone" field has "(800) 463-1234". The "Physical Address" field contains "100 S Raider Court". The "City" field has "Crosby", the "State" field has "MN", the "Zip" field has "56441", and the "Country" field has "US". There are also fields for "Fax", "Email" (cheri.petterson@growthzone.com), and "Website" (http://www.growthzone.com). A checkbox labeled "Use Physical Address as the Mailing Address" is checked, and the "Mailing Address" field also contains "100 S Raider Court". At the bottom right of the form, there are links for "Email Member" and "Labels/Envelopes".



## 2...Identify Incomplete/Inaccurate Data

The Custom Member Report is a great report to help in identifying missing data.

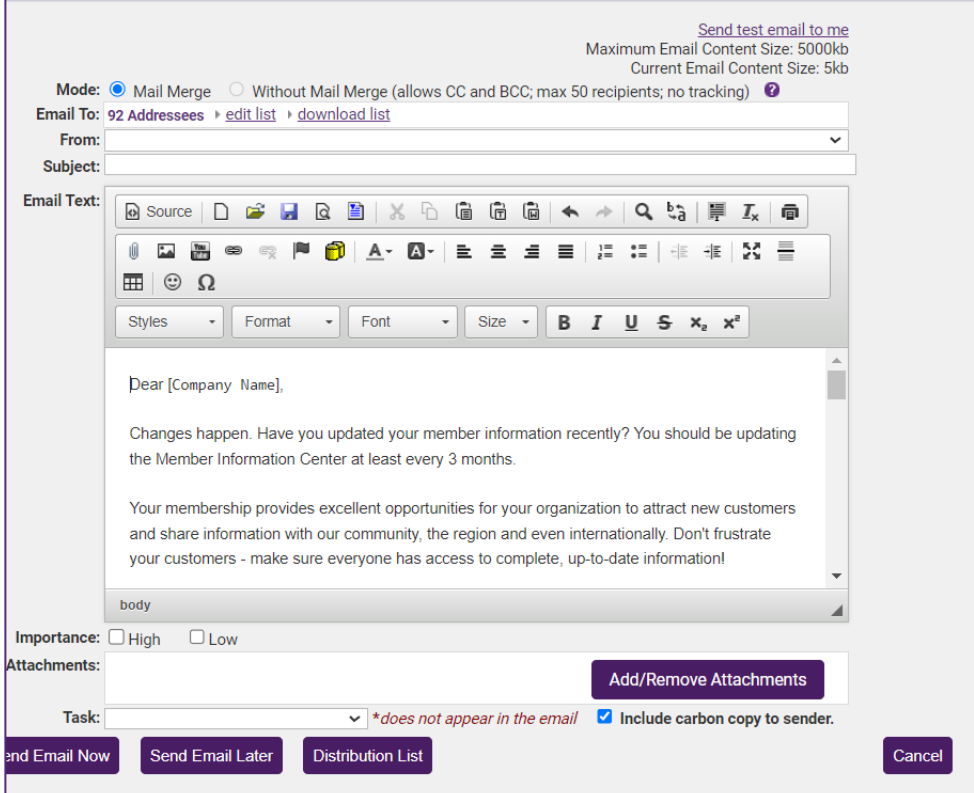
TIP! Create reports that provide the needed results and save the reports to be used for database cleanup on a regular basis!

Print Report Print PDF Create Group

CP Billing Contact Info		
Company Name	Billing Contact	Billing Email
A & T Baseball	Skinny Harold	skinny@mailinator.com
A Place for Dogs abcd	Shannon Jones	cheri.petterson@growthzone.com
Acorns	Wally Main	
Addams and Sons	Mark Addams	
Alex Race Track Events LLC		
Beautiful Home Remodeling	Peter Mays	cheri.petterson@growthzone.com
Best Company	Joan Larsen	
Cakes by Stefani		stefan@mailinator.com
Cheri's Dog Boarding	Cheri Test	
Chewy Chewy	Lance Chewy	chewchew@mailinator.com
Danico's	Tony Danico	
Dogs R' Us		loisl@mailinator.com
Fanron Realty Group		
Fayette Store	Jane Breyer	breyer@mailinator.com
Floyd's Windows		
Flutists	Jerry Flute	jerryf@mailinator.com
Frank's Pitstop	Greg Hales	marks@mailinator.com
Gabriela's Designs and Styling	Gabriela Chavez-Lopez	
Golf Tournament Non-Member	John Jacobs	
Grant's	Grant Lance	
Green Building Builders		
Henry's	Henry LeMarc	cheri.petterson@micronetonline.com
Herb's Herb House		
hi		
Horses are Us		
House of Cards	Joe House	
I Like it Shiny		diamondsareagirlsbestfriend@gmail.com

## 2...Identify Incomplete/Inaccurate Data

- Set a regular cadence to enlist your members in updating their profile information
- Use the Update your Membership Listing email template
- KB: [Send Email to Members to Update Contact Information](#)



The screenshot shows an email composition window with the following details:

- Mode:**  Mail Merge  Without Mail Merge (allows CC and BCC; max 50 recipients; no tracking) ?
- Email To:** 92 Addressees [edit list](#) [download list](#)
- From:** [Dropdown menu]
- Subject:** [Empty field]
- Email Text:** A rich text editor with a toolbar containing icons for source, undo, redo, bold, italic, underline, strikethrough, text color, background color, bulleted list, numbered list, link, unlink, indent, outdent, and a link icon. Below the toolbar are dropdown menus for Styles, Format, Font, and Size, followed by buttons for Bold (B), Italic (I), Underline (U), Strikethrough (ABC), and text color (X<sub>e</sub> X<sup>2</sup>).
- Body Text:**

Dear [Company Name],

Changes happen. Have you updated your member information recently? You should be updating the Member Information Center at least every 3 months.

Your membership provides excellent opportunities for your organization to attract new customers and share information with our community, the region and even internationally. Don't frustrate your customers - make sure everyone has access to complete, up-to-date information!
- Importance:**  High  Low
- Attachments:** [Empty field] [Add/Remove Attachments](#)
- Task:** [Dropdown menu] \*does not appear in the email  Include carbon copy to sender.
- Buttons:** Send Email Now, Send Email Later, Distribution List, Cancel

# Stop collecting data you don't use

You never want to collect data you don't use. For example, do you use all the demographic data you collect?

You should be able to tell your members exactly how you use every piece of data in their record. Ideally, that answer has something to do with better understanding their needs and interests so you can provide a stellar member experience

**Custom Fields** [Add/Edit Custom Fields](#)

**Warning!** Custom Fields should never be used to collect or store credit card numbers, social security numbers or other personal information. If this information is being collected, you will be required to remove that information.

**General Information**

Established Year:	<input type="text"/>	(Numeric - integer)
How did you hear about us?:	<input type="text"/>	(Select)
Join Reason:	<input type="text" value="Educational Opps"/>	(Select)
Ownership:	<input type="text" value="Minority Owned"/>	(Select)
Pain Points:	<input type="text"/>	(Select)

**Sales Funnel**

Date of Initial Contact:	<input type="text"/>	(Date/Time)
Lead Source:	<input type="text"/>	(Select)
Probability of Win:	<input type="text"/>	(Numeric - integer)
Sale Temperature:	<input type="text"/>	(Select)
Industry:	<input type="text"/>	(Select)
Estimated Close Date:	<input type="text"/>	(Date/Time)

**Professional Credentials**

Are you a Young Professional:	<input type="checkbox"/>	(Boolean)
License #:	<input type="text"/>	(Select)

500 chars available

# 3...Stop collecting data you don't use

## What to do?

While we don't recommend deleting data, if you are certain you no longer will need the information you can remove the fields.

TIP! If you think you may want/need the information in the future run the Custom Member report with those fields prior to removing

**CP Training Site**  
Member   
Drag rows to change the display order of the fields.

Custom Fields

Field Name	Field Type	Field Size	MIC Search	Member Permission	
General Information					
Established Year	Numeric: Integer	N/A	<input type="checkbox"/>	Disabled	<input type="checkbox"/>
How did you hear about	Select	<a href="#">edit items</a>	<input type="checkbox"/>	Disabled	<input type="checkbox"/>
Join Reason	Select	<a href="#">edit items</a>	<input checked="" type="checkbox"/>	Read/Wri	<input type="checkbox"/>
Ownership	Select	<a href="#">edit items</a>	<input type="checkbox"/>	Disabled	<input type="checkbox"/>
Pain Points	Select	<a href="#">edit items</a>	<input type="checkbox"/>	Disabled	<input type="checkbox"/>
Sales Funnel					
Date of Initial Contact	Date	N/A	<input type="checkbox"/>	Disabled	<input type="checkbox"/>
Lead Source	Select	<a href="#">edit items</a>	<input type="checkbox"/>	Disabled	<input type="checkbox"/>
Probability of Win	Numeric: Integer	N/A	<input type="checkbox"/>	Disabled	<input type="checkbox"/>
Sale Temperature	Select	<a href="#">edit items</a>	<input type="checkbox"/>	Disabled	<input type="checkbox"/>
Industry	Select	<a href="#">edit items</a>	<input type="checkbox"/>	Disabled	<input type="checkbox"/>
Estimated Close Date	Date	N/A	<input type="checkbox"/>	Disabled	<input type="checkbox"/>
Professional Credentials					
Are you a Young Profes	Boolean	N/A	<input checked="" type="checkbox"/>	Read Onl	<input type="checkbox"/>
License #	Select	<a href="#">edit items</a>	<input type="checkbox"/>	Disabled	<input type="checkbox"/>
Professional Experienc	Text	500	<input checked="" type="checkbox"/>	Read Onl	<input type="checkbox"/>
Interests					
What services are you i	Text	1	<input type="checkbox"/>	Disabled	<input type="checkbox"/>
Ribbon Cutting	Boolean	N/A	<input type="checkbox"/>	Disabled	<input type="checkbox"/>
Networking Mixer	Boolean	N/A	<input type="checkbox"/>	Disabled	<input type="checkbox"/>
Section Header					
Exhibitor	Boolean	N/A	<input type="checkbox"/>	Disabled	<input type="checkbox"/>
Sponsor 2022	Boolean	N/A	<input type="checkbox"/>	Read Onl	<input type="checkbox"/>

▶ Add A Field   ▶ Add A Section Heading   ▶ Remove Selected Fields

# 4...Review your invalid emails and update

Invalid emails will obviously prevent you from communicating with your members, but also will impact your sender reputation.

- What to do??? Use the **Quarantined Invalid Email Address**

Emails Quarantined: 114							
Action	Email	Quarantine Reason	Quarantine Date	Mem ID	Member	Member Status	Rep
<a href="#">Re-Check</a>   <a href="#">Change</a>	acorn@mailinator.com	Invalid email address; may contain invalid characters or is incomplete	2/10/2022	169	Acorns	Active	
<a href="#">Re-Check</a>   <a href="#">Change</a>	acorn@mailinator.com	Invalid email address; may contain invalid characters or is incomplete	2/10/2022	169	Acorns	Active	
<a href="#">Re-Check</a>   <a href="#">Change</a>	addams@mailinator.com	Invalid email address; may contain invalid characters or is incomplete	2/10/2022	15	Addams and Sons	Active	
<a href="#">Re-Check</a>   <a href="#">Change</a>	amore@mailinator.com	Invalid email address; may contain invalid characters or is incomplete	2/10/2022	1440	It's Amore	Active	
<a href="#">Re-Check</a>   <a href="#">Change</a>	amore@mailinator.com	Invalid email address; may contain invalid characters or is incomplete	2/10/2022	1440	It's Amore	Active	
<a href="#">Re-Check</a>   <a href="#">Change</a>   <a href="#">MarkAsGood</a>	apeevy@m.com	No MX Record; MX record of the domain doesn't exist.	12/7/2017	41	A Place for Dogs	Active	
<a href="#">Re-Check</a>   <a href="#">Change</a>	beatyu@mailinator.com	Invalid email address; may contain invalid characters or is incomplete	2/10/2022	1455	Beautiful Home Remodeling	Active	
<a href="#">Re-Check</a>   <a href="#">Change</a>	beatyu@mailinator.com	Invalid email address; may contain invalid characters or is incomplete	2/10/2022	1455	Beautiful Home Remodeling	Active	
<a href="#">Re-Check</a>   <a href="#">Change</a>	bikes@mailinator.com	Invalid email address; may contain invalid characters or is incomplete	1/7/2022	1289	The Bycycle Shop	Active	
<a href="#">Re-Check</a>   <a href="#">Change</a>	bjohnson@mailinator.com	Invalid email address; may contain invalid characters or is incomplete	10/9/2021	5	The Bait Shop	Active	
<a href="#">Re-Check</a>   <a href="#">Change</a>   <a href="#">MarkAsGood</a>	brookesandy@none.com	Rejected email; SMTP server rejected email; the email account doesn't exist	12/7/2017	1200	The Cotton Candy Stand	Active	
<a href="#">Re-Check</a>   <a href="#">Change</a>   <a href="#">MarkAsGood</a>	brookesandy@none.com	Rejected email; SMTP server rejected email; the email account doesn't exist	12/7/2017	1200	The Cotton Candy Stand	Active	

invalid

# Ensure members are categorized correctly

Update your database to accurately reflect the status of your contacts, so that going into 2024 you have a true view of potential prospects, and can focus your energies on them

- Prospects and Communication by Rep; Detail

 <b>Prospects &amp; Communication Detail</b>		
Rep	Lead	Days Since Contact
Andrea Anderson	CCOC	915
	<b>Total: 1</b>	<b>Average: 915</b>
Charlie Fromson	Bonner Springs Edwardsville-Area Chamber of Commerce	915
	<b>Total: 1</b>	<b>Average: 915</b>
Jody Blowers	Vern's Shoes	915
	Missy's DIY	1000
	TN Wedding Coordinator	1000
	<b>Total: 3</b>	<b>Average: 971</b>

# Guide to Maintaining a Clean & Healthy Database

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IDENTIFY DATA  
REQUIRING THE  
MOST ATTENTION



CREATE A PLAN



CLEANSE YOUR  
DATA



INSTITUTE  
BUSINESS RULES



SCHEDULE  
REGULAR DATA  
CLEANUP

# Questions?