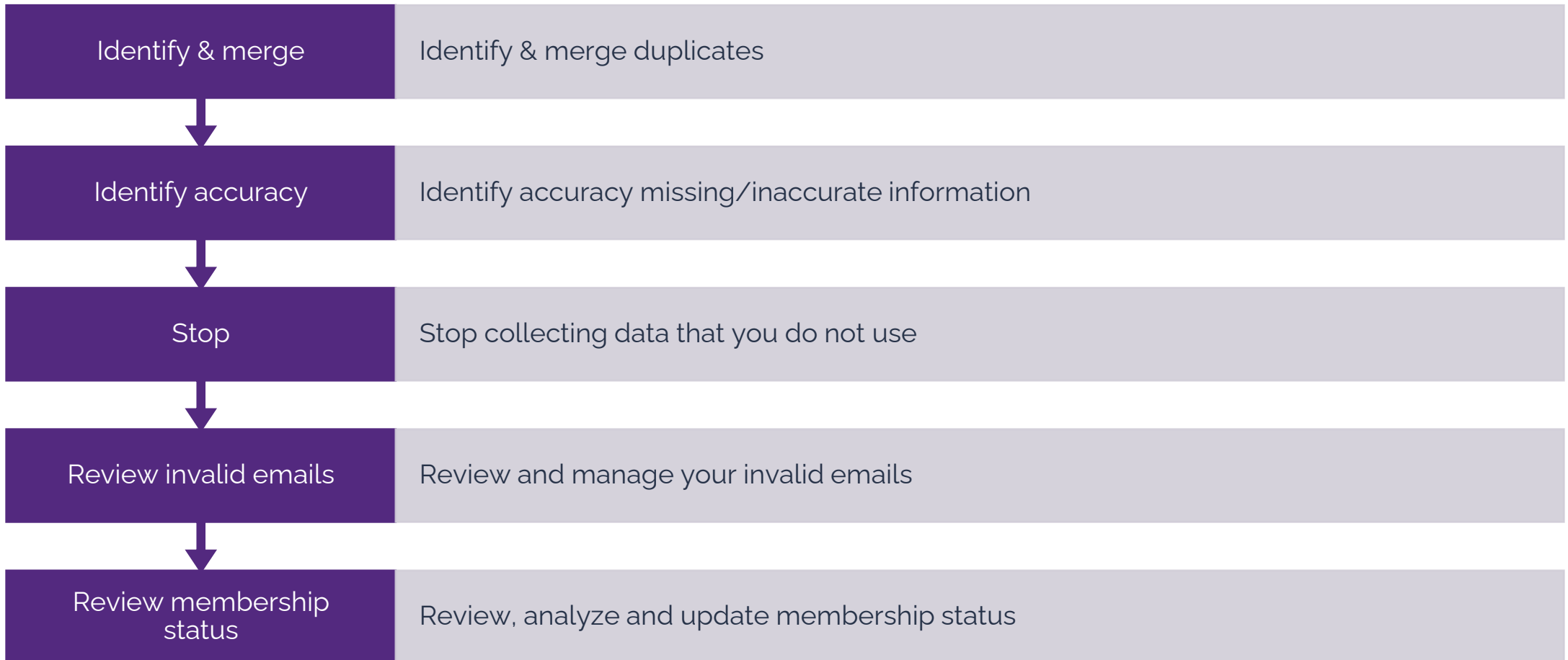


# Best Practices for a Healthy & Clean Database

# Clean Up “Dirty Data”



# Clean Up “Dirty Data”

1. Identify and merge duplicate data
2. Identify incomplete and/or inaccurate data
3. Stop collecting data you don't use
4. Review invalid emails
5. Review Membership Status



# 1. Identify & Merge Duplicates

- How did duplicates get into your database in the first place?
  - No standardized procedure for how information is added to database
  - Staff not verifying records already exist before entering information
  - Membership Application submitted when Prospect already exists in database
  - Event Registrations not appropriately matched to existing contacts
- TIP! Establish specific guidelines for how data is entered into database



**How many John Smiths really?**

# 1. Identify & Merge Duplicates

## • Custom Member Report

- Use to identify duplicate records in your database
- Use several pieces of identifying information in report
- Export to Excel
- Use the Excel Functionality to identify duplicates
  - Search by Company Name, Email Address, etc.

	A	B	C	D	E	F	G
19	Big Foot Shoe Shop	11/3/2022	11/3/2022	shoes@mailinator.com	5678 Portage	Big Foot	
20	Black Diamond Advertising	3/22/2018	3/22/2018	blackdiamond@mailinator.com	128 w 8th st	Colette Walters	Colette Walter
21	Bobber Gifts	5/28/2019	5/28/2019	bobber@mailinator.com	P.O. Box 234	Jill Jones	Jill Jones
22	Cakes by Katie	9/1/2022	11/3/2022	katiescakes@mailinator.com	657 First Street	Katie Cakes	Katie Cakes
23	Car Dealership	11/11/2023	11/16/2023				Abi Normal
24	Casino		1/24/2024	jack@mailinator.com			Jack Pott
25	Clearview Window Repair		11/3/2022	windowrepair@mailinator.com			
26	Crystal Clear Window Washing	12/19/2023	12/19/2023	crystal@mailinator.com			Crystal Glass
27	Custom Cabinets	5/18/2012	9/15/2017	customcabinets@mailinator.com	65874 Cty Road 2	Shane Koglin	Shane Koglin
28	Dana's Fashion Boutique	9/9/2022	9/9/2022	dana@mailinator.com	202 N Rose Street		Dana Jones
29	Diephouse Realty	9/1/2022	12/5/2023	mwest@mailinator.com	1903 W. Michigan	Sarah Samuels	Sarah Samuels
30	Dietrich Farms	1/2/2012	9/15/2017	dietrichfarms@mailinator.com	PO Box 46	Lloyd Caine	Lloyd Caine
31	Dinah's Fireworks		5/30/2023	dmite@mailinator.com			Dinah Mite
32	Discover Kalamazoo	9/1/2022	2/14/2023	discoverkalamazoo@mailinator.com			Lenny West
33	Elizabeth's Creations		9/8/2022				
34	Emma's Kitchen	5/5/2022	3/21/2018	emmas@mailinator.com			
35	Emma's Kitchen		9/8/2022				
36	Furniture Store	5/5/2023	5/5/2023	furniture@mailinator.com			Patty O' Furnit
37	Gabby's Dry Cleaning	10/4/2022	10/4/2022	gabbydrycleaning@mailinator.com	9393 W. Michigan	Gabby Thomas	Gabby Thomas
38	Gary's Guitars		4/3/2018	garysguitars@mailinator.com	143 Farmers Alley	Gary Johnson	Gary Johnson
39	Happy Days Child Care	3/22/2018	3/22/2018	hdcc@mailinator.com	101 Main		Jane Smith
40	Jane's Coffee Shop		2/24/2023				Jane Jameson
41	Jane's Juice Joint		3/28/2023				Jane Smith
42	Jannie Wille		3/22/2018				
43	Joe's Crab Shack		4/4/2018	joescrabshack@mailinator.com			Joe Shack
44	Joel's Voice Lessons	5/5/2022	5/21/2018	joelvoicelessons@mailinator.com			Joel Full
45	Josef's Bakery	2/10/2023	2/10/2023		70978 East Street	Josef Cakes	Josef Cakes
46	Juice Joint		11/30/2022				Amy McKibbor
47	Kalamazoo Animal Shelter		11/3/2022	kalamazooanimalshelter@mailinator.com			
48	Kalamazoo Aquarium		12/18/2023	maureen@mailinator.com			Maureen Biolo
49	Kalamazoo Brewery Tours		9/29/2022	kzoobrewtours@mailinator.com			Alexander Smi
50	Kalamazoo Candy Store	11/2/2022	11/2/2022	kzoocandy@mailinator.com	3456 W Main	Kalamazoo Candy	
51	Kalamazoo Coffee Shop		11/2/2022	kzoocoffee@mailinator.com	780 W Main Street	Kalamazoo	

# 1. Identify & Merge Duplicates

- Merge Duplicates
  - Best Practice: merge older record into newer record
    - Newer record usually has the most current data
  - Select data to retain for each field within record
- Administrator permission level required
- Merge cannot be undone
  - Ensure accuracy before merging

**Member - Merge**

**Best Company**

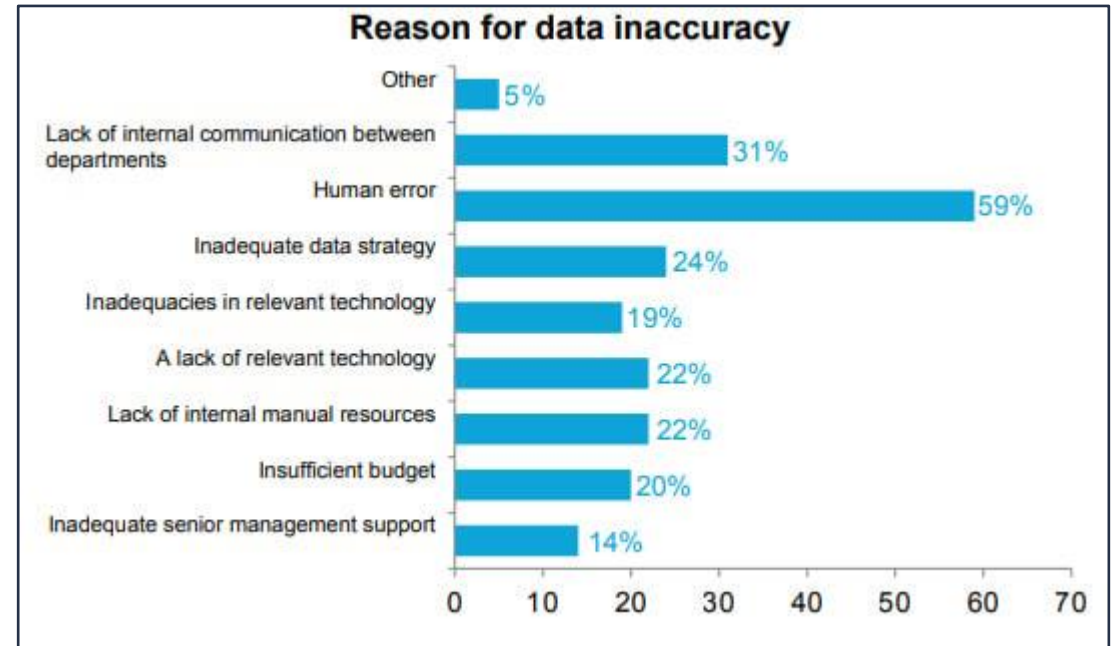
Only values that differ between the selected members will show up on the list below. Click on value you want to use for the final merged value from values for either **Best Company** or **Best Company**. The currently selected value is highlighted in green.

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

## 2. Identify Incomplete/Inaccurate Data

- Use your reports to find missing data in your database
  - Information needed to interact with members
  - Information important to providing great member experience
  - Information needed for board reports
  - Information needed for event invitations



## 2. Identify Incomplete/Inaccurate Data

- Follow procedure for adding a new member record
- If using the Membership Application, ensure you're gathering the minimum information needed for a complete record
  - Use Custom Fields to gather pertinent information

**KALAMAZOO CHAMBER**  
EST. 1990

**MEMBER APPLICATION**

We are thrilled you are interested in joining the Kalamazoo Area Chamber! We invite you to make this valuable investment in your business and in this community. As a member of the chamber, your organization will enjoy a competitive advantage with opportunities for growth and learning, connections with government leadership, and an evolving program of pro-community and pro-business initiatives.

**Step 1:** Member Info  
**Step 2:** Additional Info  
**Step 3:** Primary Contact  
**Step 4:** Billing Contact  
**Step 5:** Membership Options

**Step 1:**

Member Info



## 2. Identify Incomplete/Inaccurate Data

- Use Custom Member Report
  - Helps identify missing data
- Create Custom Member Report with necessary fields and save to use for regular database cleanup
  - Run on regular basis (monthly, quarterly, etc.)

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	Shannon Jones	cheri.petterson@growthzone.com
abcd		
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 remind your members to update their profile information
  - [How Do I Get Chamber Members to Update Their Information?](#)
- Use the [Update your Membership Listing](#) email template
  - Quickly determine if information is accurate
  - Link to [MIC](#) to change anything that needs updating

Dear A Place for Dogs,

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!

**Important:** Completing your profile is critical to gaining increased visibility and exposure!

Take a few moments to review your information below and then access the online Member Information Center to make changes.

**Our Records:**

Company Name:	A Place for Dogs
Primary Phone:	(218) 546-5413
Physical Address:	21748 S Raider Court Winona, MN 55987
Mailing Address:	21748 S Raider Court Winona, MN 55987
Billing Contact:	Kase Brady
Billing Address:	Kase Brady 34 Main Street Nisswa, MN 56468
All Representatives:	Eric Allan Louis Armstrong Ben Bowman Krystal Bowman Kase Brady Chad Bring Jack Jones Mark Kilton

# 3. Stop Collecting Data You Don't Use

- You never want to collect data you don't use
  - Do you use all the demographic data you collect?
  - Custom Fields for Members, Reps, Events, Groups, etc.
- Disable Custom Field
  - Maintain data collected without further clogging up your database
  - Keep custom field for use in the future

**Custom Field Information**  
Kalamazoo Area Chamber

Member ▼

Drag rows to change the display order of the fields.

Custom Fields

Field Name	Field Type	Field Size	MIC Search	Member Permission	<input type="checkbox"/>
General					
Why did you join?	Select	<a href="#">edit items</a>	<input checked="" type="checkbox"/>	Read Onl	<input type="checkbox"/>
Would you like a ribbon	Boolean	N/A	<input checked="" type="checkbox"/>	Read/Writ	<input type="checkbox"/>
Are you willing to host	Boolean	N/A	<input checked="" type="checkbox"/>	Read/Writ	<input type="checkbox"/>
Would you like to volun	Boolean	N/A	<input checked="" type="checkbox"/>	Read/Writ	<input type="checkbox"/>
Number of Employees	Select	<a href="#">edit items</a>	<input checked="" type="checkbox"/>	Read/Writ	<input type="checkbox"/>
Referred by	Text	50	<input type="checkbox"/>	Read/Writ	<input type="checkbox"/>
When is your birthday?	Date	N/A	<input checked="" type="checkbox"/>	Read Onl	<input type="checkbox"/>
Business District	Select	<a href="#">edit items</a>	<input type="checkbox"/>	Disabled	<input type="checkbox"/>
What industry are you i	Text	100	<input type="checkbox"/>	Disabled	<input type="checkbox"/>
Ownership					
Family Owned?	Boolean	N/A	<input checked="" type="checkbox"/>	Read/Writ	<input type="checkbox"/>
Minority Owned?	Boolean	N/A	<input checked="" type="checkbox"/>	Read/Writ	<input type="checkbox"/>
Veteran Owned?	Boolean	N/A	<input checked="" type="checkbox"/>	Read/Writ	<input type="checkbox"/>
Women Owned?	Boolean	N/A	<input checked="" type="checkbox"/>	Read/Writ	<input type="checkbox"/>
Local Small Business	Select	<a href="#">edit items</a>	<input checked="" type="checkbox"/>	Read/Writ	<input type="checkbox"/>
Are you a legally certifi	Boolean	N/A	<input checked="" type="checkbox"/>	Read/Writ	<input type="checkbox"/>
Prospective Member Information					
Source How did you he	Select	<a href="#">edit items</a>	<input type="checkbox"/>	Disabled	<input type="checkbox"/>
Sales Temperature	Select	<a href="#">edit items</a>	<input type="checkbox"/>	Disabled	<input type="checkbox"/>
Rating	Numeric: Integer	N/A	<input type="checkbox"/>	Disabled	<input type="checkbox"/>
Date Added to Pipeline	Date	N/A	<input type="checkbox"/>	Disabled	<input type="checkbox"/>
Stage in Sales Process	Select	<a href="#">edit items</a>	<input type="checkbox"/>	Disabled	<input type="checkbox"/>
Close Date	Date	N/A	<input type="checkbox"/>	Disabled	<input type="checkbox"/>
Forecasted Month	Select	<a href="#">edit items</a>	<input type="checkbox"/>	Disabled	<input type="checkbox"/>
Dues Amount	Numeric: Decimal	N/A	<input type="checkbox"/>	Disabled	<input type="checkbox"/>

[Add A Field](#) [Add A Section Heading](#) [Remove Selected Fields](#)

[Save & Exit](#) [Close](#)

# Custom Field Report

- Not Recommended:  
Remove Custom Field
  - Deletes responses and data
- Run Custom Member Report or Custom Rep Report before deleting
- Save report to keep historical data

The screenshot displays the Chambermaster PRO interface for configuring a report. The left sidebar shows navigation options like Dashboard, Members, Groups, and Reports. The main content area is titled 'Reports' and 'Representative Listing'. Under 'Saved Reports', there is a dropdown menu for 'Load A Saved Report' and a 'Delete Selected Report' button. The 'Fields Reported' section is divided into 'Available Fields' and 'Selected Fields'. The 'Available Fields' list includes 'Rep Personal Information', 'Rep Contact Information', 'Member Contact Information', 'Member Information', 'Custom Rep Fields', and 'Custom Member Fields'. The 'Custom Rep Fields' section is highlighted with a red box and contains four checkboxes: 'Would you like a Chamber Mentor?', 'Interested in Continuing Education courses?', 'Would you be interested in hosting a Board of Directors Meeting?', and 'Business District'. Below these are 'Meal Choice for Events' and 'Do you have any food allergies we should be aware of for events?'. The 'Selected Fields' section on the right has a 'clear fields' button and two dropdown menus for 'Primary Sort' and 'Secondary Sort'. A 'Continue' button is located at the bottom of the configuration area.

# 4. Review Invalid Email Addresses & Update

- Invalid emails prevent you from communicating with members
  - Also impacts your sender reputation
  - Maintain clean email lists
- Quarantined Invalid Email Addresses Report
  - Use to view emails marked as invalid
  - View Quarantine Reasons

Member Status: Do Not Filter by Member Status ▾  
Quarantine Status: All ▾  
Details: Off ▾  
Refresh Report

1 of 1 | Save as Excel CSV

### Invalid Email Addresses

ChamberMaster Logo

**Emails Quarantined: 5**

Action	Email	Quarantine Reason	Quarantine Date	Mem ID	Member
Re-Check   Change   MarkAsGood	info@XYZ.COM	Rejected email; SMTP server rejected email; the email account doesn't exist	7/28/2019	36	XYZ General Store
Re-Check   Change   MarkAsGood	jjones@diephouserealty.com	No MX Record; MX record of the domain doesn't exist.	10/21/2022	124	Diephouse Realty
Re-Check   Change   MarkAsGood	mwest@diephouserealty.com	No MX Record; MX record of the domain doesn't exist.	10/11/2022	124	Diephouse Realty
Re-Check   Change   MarkAsGood	s@stacey.com	No MX Record; MX record of the domain doesn't exist.	7/28/2019	16	MicroMachines of West M
Re-Check   Change   MarkAsGood	sam@mailinator.com	No MX Record; MX record of the domain doesn't exist.	7/28/2019	40	Tie Dye Designs


**Will Be Quarantined: 1**

Action	Email	Quarantine Reason	Planned Quarantine Date	Mem ID	Member
Re-Check   Change   Quarantine Tonight	crystal@mailinator.com	Invalid email address; may contain invalid characters or is incomplete	2/23/2024	127	Cry

1/30/2024 3:56:49 PM

# 5. Ensure Members Are Accurately Organized

- Do members have the appropriate Membership Status?
  - Active
  - Dropped/Inactive
  - Courtesy
  - Non-Member
  - Prospect
- Ensures true representation of Prospective Members
  - Focus your efforts
- Prospects and Communication by Rep: Detail Report
- Custom Member Report



### Prospects & Communication Detail

Rep	Lead	Days Since Contact
Andrew Lewis	Emma's Kitchen	12
	Kalamazoo Brewery Tours	19
	<b>Total: 2</b>	<b>Average: 15</b>
John Thompson	Kalamazoo Coffee Shop	51
	<b>Total: 1</b>	<b>Average: 51</b>
John-Jacob Jingleheimer-Schmidt	Juice Joint	14
	<b>Total: 1</b>	<b>Average: 14</b>
Mary West	Elizabeth's Creations	16
	<b>Total: 1</b>	<b>Average: 16</b>
Sandra Dee	Custom Cabinets	19
	Pedal Bike Shop	12
	<b>Total: 2</b>	<b>Average: 15</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

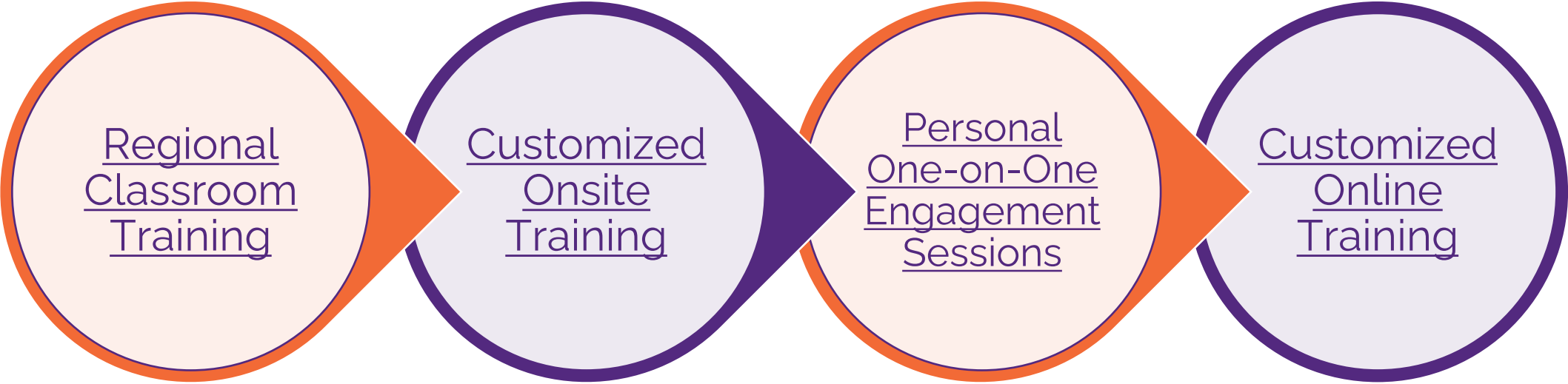
# Training Resources





# Expanded Training Offerings

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# Questions?