## CASE STUDY
### *Data Auditing: A Proven Process for Success*

**Why Is Quality Data Important?**

For any organization, the key to success lies in the integrity and quality of its data. Mailing lists, membership records, email databases, listservs. When these vital tools contain complete, accurate, and actionable data, an organization can make the most of its resources and create meaningful, long-term connections and boost revenue without wasting resources or missing opportunities.

> *"There are certainly monetary returns with a data audit. There are also intangible returns that strengthen an organization's brand. Having strong data allows you to have real, meaningful conversations with key stakeholders."*
>
> *Tim Bower, CAE*
> *Bower Management Services*

**What Is a Data Audit?**

A data audit is a full-scale analysis of a company's data, where the origin, creation, format, and comprehensiveness of data is reviewed to assess its accuracy and utility. Data auditing looks to identify what information is mission critical, useful but not essential, or unneeded, and to map these different elements to ensure there is a reason and a plan for each piece of data that is collected. The results of this process offer an organization the opportunity to think strategically about the information that they gather and take steps to use it effectively.

> *"One of the great things about a data audit is that the results are unique to each organization.  Almost always, there is a set of unexpected findings that we wouldn't have noticed if it wasn't for the deep dive."*
>
> *Todd Von Deak, MBA, CAE*
> *TVD Associates*

**What Steps Are Involved?**

A data audit requires minimal time output and resource allocation on the part of an organization. A typical audit might require two or three phone calls with key personnel, and then an outside analysis of stakeholder data sets, where existing approaches to how data is captured, processed, and used to support decision-making is examined. At the end of an audit, a report containing strategic findings and suggested steps is delivered. Recommendations can range from ideas for streamlining data collection and improving record accuracy to tips for bolstering donor engagement and growing membership rolls.

Areas of analysis in a data audit can include:

- Completeness of individual member records
- Accuracy of postal addresses
- Deliverability of email addresses
- Internal data management processes
- In-house data policies and procedures
- Efficiency of data warehousing
- Effectiveness of data hygiene practices

*"The process was simple; the results were actionable. It helped identify opportunity to save funds and improve our programmatic offerings….it was a truly valuable exercise."*

*Joe Sapp, CAE*
*MASAE Membership Committee Co-Chair*
*Talley Management Group*

**What Are the Benefits of a Data Audit?**

The benefits from a data audit are numerous and varied, depending on the organization:

- Cost savings across many areas (direct mail campaigns, collateral production, list purchases)
- Improved outbound campaign results (lower bounce rates, increased retention, membership growth)
- Strengthened understanding of membership and target audiences
- Increased campaign efficiencies (reductions in returned mail, bad addresses, rejected emails)
- Opportunities for scalability and growth in knowledge-gathering efforts

**To Learn More**

For almost two decades, TVD Associates has provided counsel on strategy and management challenges in the non-profit and association arenas. Our consulting practice focuses on helping small- to medium-sized organizations strategically leverage their available data for strategic gains. Contact us today about your organization's needs and learn how a data audit might play an important role in improving your business.

TVD Associates
Todd Von Deak, MBA, CAE
todd@tvdassociates.com
267-258-5788
www.tvdassociates.com