



Polishing the Crown Jewels

Data Quality Management

For any customer centric organisation and for membership organisations in particular, maintaining an accurate, up to date and clean store of membership data is an essential ingredient in being able to deliver the kind of customer experience that a member expects. But keeping data clean, de-duplicated and up to date is no easy task unless it is planned for and built into the day to day management of membership information.

Membership data comes from many sources, from:

- Completed membership forms
- Business cards collected at events
- Details telephoned or emailed through
- Web site form submissions
- Faxes received
- And many other channels

So having a centralised repository for core membership data rapidly becomes an essential requirement for any membership organisation. There is nothing more embarrassing or damaging to a members view of an organisations perception of them, than being wrongly communicated to by two areas of the same organisation who hold different views of a members details. So having a clean, accurate “single view of the truth” is essential.

So how do we go about getting clean data and keeping clean? The foundation of any data management strategy is a periodic mass data cleanse exercise that takes all key data – at an organisation and/or individual level – and de-duplicates the data against itself and then cleans key data fields against established key reference data. For example:

1. Validates addresses against the post code data file
2. Validates that phone numbers are in the right format and have the right std code for the location given
3. Validates that email addresses are in the correct format and have valid domain names associated to them

This periodic data cleanse will give a clean base from which to build going forward.

Keeping the data up to date and clean on an on-going basis must then be built into business processes and technology solutions as data is updated by membership management staff and/or by



the members themselves. Providing data validation facilities at the point of data entry, whilst not impacting in a negative fashion on the data entry experience, ensures that the data entered matches data reference points. For example checking that the address lines are correct for a given post code, the std code for the telephone number is accurate, and the email address has a valid domain name. All of these “lookup” facilities are easily built into a data entry user interface – for both membership staff and members themselves – and add immense value to ensuring that clean data is entered into a solution.

Once the core data has been validated and cleansed and the record is added to the database, it is important to ensure that the record being added is not already present in the database and, hence, is being duplicated. Data de-duplicate algorithms should be configured appropriately for your particular required level of de-duplication checks to ensure that you can detect the majority of duplicates but, at the same time, do not negatively impact on the process of entering data into the solution. For example, you will need to determine which combination of data fields should be used for a duplicate check – in most case, a combination of first name, last name, post code, first line of address, and email address are used.

Within the combination, you will need to determine the level of “fuzziness” that you will use to match data – for example, is “Dave” and “David” the same, is a slight mis-spelling of a first line of address (a common factor in web form completion) acceptable and will it be able to be used for de-duplication purposes? A competent data management expert will be able to advise you on the basics for such algorithms and will be able to implement them for your particular situation. These algorithms should be reviewed regularly to ensure that they are meeting your needs.

The question of when, and by whom, data de-duplication should be performed should be addressed. For membership staff, should it be upon entering and saving data within the solution (i.e. at the point of data entry) or should it be a separate offline activity (or should it be a combination of both)? For members entering or modifying their data online then it is highly unlikely that you will ask the member to de-duplicate their own data – there are huge data protection and privacy implications of allowing them to de-dupe themselves. So where and by whom, is such data de-duplication to be performed? Again, your data management strategy should address these points and should be periodically reviewed to ensure that it is working from a data quality viewpoint and a customer experience viewpoint.

As we have seen from just the brief outlines above, there is a fair amount to think about with regards to a data management strategy. It is essential that any data management strategy is built around practical, pragmatic customer and member engagement strategies and becomes a natural part of the customer/member engagement processes. If it becomes an artificial “add on” to such processes, then it won’t happen and your data will rapidly decay and become worse than useless. A clear, concise, common sense data management strategy should be documented and adopted across the organisation. It should also be reviewed on a regular basis as a key part of the overall customer/membership management review process. Only then can it provide an invaluable platform for the ongoing quality management of membership data, providing the basis for the development and implementation of all product and service offerings that your organisation wants and needs to provide to its membership base going forward.

