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# Guide to building a better data strategy



Villy Savino, CSM, CSPO  
VP of Technology Transformation

Data seems to be the buzz word in the association space these days, but mainstream organizations have been utilizing data to shape business decisions for the past 20 years. So why are associations so behind?

## Common issues found among associations are the following:

1. Data driven culture is not supported with the organization
  - There is no C-Suite Champion or Board support for the program
  - Program driver lacks clear business plan and/or return on investment for program
2. Lack of knowledge and skills to execute and drive the strategy
  - Staff are not knowledgeable about their own data – terminology, setup, and drivers of the data
  - Data is siloed, stored, and managed by different departments
  - Strategy and execution take time – not a sprint, but a marathon
3. Bad data or lack of confidence in the organizations' data within the AMS/CRM
  - Bad data in, bad data out - an attribution of legacy data, irrelevant data to the current business and/or lack of data cleansing

## So, what can YOU do to help drive a data driven culture?

By admitting to the failures above, we can move forward, define the gaps and build solutions to help enforce, champion and drive the culture that we've all been desiring.

1. ***If a data driven culture is not supported within the organization***, find an ally within the C-suite or board that will help you push your program through. Provide this champion with key facts such as:
  - a. Why implementing a data driven culture is important?

- b. The ROI if data is utilized within the associations' marketing, sales, and research initiatives
    - c. Outline a proposed list of team members to help execute this program
  2. If skill and knowledge an issue within your organization, you can try the following:
    - a. Reach out to an expert in the field – existing vendors and/or consultants that can help guide and support you through the process if resources are limited
    - b. There are many online resources and community members that have or currently working on the same initiatives – reach out to your network
    - c. Recruit key staff members from every department to help discuss, consolidate, audit, and manage your organization's data – this is the start of your data governance team
  3. If bad data is your arch nemesis – don't fret, this is atypical of many associations. Start with the following strategies:
    - a. Create a unified organizational data dictionary
      - i. Define the type of data being collected, where it's coming from, and how data is utilized across the organization
      - ii. Create policies on what and how data can be utilized, sourced and/or sold to
    - b. Create standard operating procedures on data cleansing, management of duplicate data - from current source and/or across other third-party systems
    - c. Create a cadence of meetings and agenda to review policies, procedures or adoption of new data and formats – usually driven and run by the data governance team.

**But what if ALL roadblocks have been resolved? How can I utilize data to drive decision-making outcomes?**

To effectively collect and utilize data as a methodology to obtain clear insights, an organization must provide the structure to fully support the culture such as:

- Clear business objectives from the business owners
- A data governance committee to manage and create policies to collect, store, and disperse the data – you may want to explore what is your organization's data maturity model compared to other associations.
- A team to support and analyze the data
- A platform/technology to house, manage and provide quick snapshots and dashboards

Once this structure is in place, business owners can request insights to reports such as:

- Current or Past behaviors, activities/engagements, and/or purchases
- Predictive analysis – usually based on aggregated data using statistical outcomes or machine learning
- Trends/Forecasting analysis – based on past data and market trends
- Sentiment analysis – based on machine learning and natural language processing

Here's a few ideas on using data to drive insights

<i>Department</i>	<i>Objectives</i>	<i>Data Insights &amp; Outcomes</i>
<i>Membership</i>	Increase Dues Revenue by focusing on retention rate	An org can predict the purchase behaviors of their members using predictive analysis on when and who is likely to renew. They can pivot and focus on marketing to members before they lapse, thus retaining a higher number of renewals instead of drop-offs.
<i>Events</i>	Increase registration for annual summit	An org can analyze past purchases behaviors to forecast their registration for early birds, regular registration and onsite. By using this methodology, they can further segment their campaigns and focus on locality to incentivize non-early adopters to register and local registrants with a deep discount since no stay or travel was required. This strategy provided the org with quick conversions and higher registration counts for their sponsors.
<i>Foundation</i>	Increase donation and engagement with Foundation	Based on positive or negative responses within the community site, an org can review insights for their campaigns and determine if campaign is successful by implementing sentiment analysis. If feedback was not well received, the Foundation knows to move into a different direction to further engage their donors.

Taking on a data driven culture is a big task, but doable and well worth it. Start small and revise, revise, revise. As you get familiar with your data, the next step is to incorporate these data points into an actionable plan to provide a better user experience with tailor and personalized experiences. You've got this!