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&

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presents

Data Hoarders:
Association Edition

December 2022

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Ground rules...

- This session is being recorded!

- No question is off limits! This is a safe space,
  but we understand if you wish to remain anonymous.
  (Use the Q&A Function)

- Ask them in chat and we will do our best to address
  them as we go.

- If the question is too specific to a particular situation, we
  may defer it but are happy to talk to you offline or after
  the event.

- Each session is worth 1 CAE credit –
  details to claim emailed tomorrow

CAE

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Our Presenters

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Villy Savino currently serves as Vice President of Technology Transformation for CoreNet Global. She is a results-oriented leader with over 20 years experience in operational optimization with a focus on delivering process improvements.

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James C. Marquis is a seasoned senior executive with more than 30 years of experience working in technology with a wide variety of associations and nonprofits. James' work experience includes serving as CIO for a large medical association, CEO of a technology consulting organization and senior roles in product development and business consulting for for-profit and nonprofit clients. He also has designed and built multiple Internet-based business applications including Mojo Middleware™.

To set the stage…

A Veritas study showed over **62%** of office professionals admit to data hoarding – **90%** of these employees admit to having personal files in company storage!

More of a problem… **82%** of non-IT Executives do not see data hoarding as an issue.

SOURCE:
Veritas –
https://www.northdoor.co.uk/app/uploads/2018/10/Veritas-Data-Hoarders-Report-US.pdf

Some Ugly Examples…

44% Unencrypted personal records

44% Job applications to other companies

38% Unencrypted company secrets

25% Embarrassing employee correspondece

And we're generating more data than ever!

Data is being generated at a staggering rate:

- **2.5 quintillion bytes** is how much data is created <u>every day</u>. If you never heard the word 'quintillion' before, you are not alone. (That is 1 with 18 0's!)

- An average person creates **1.7 MB** of data <u>every second</u>.
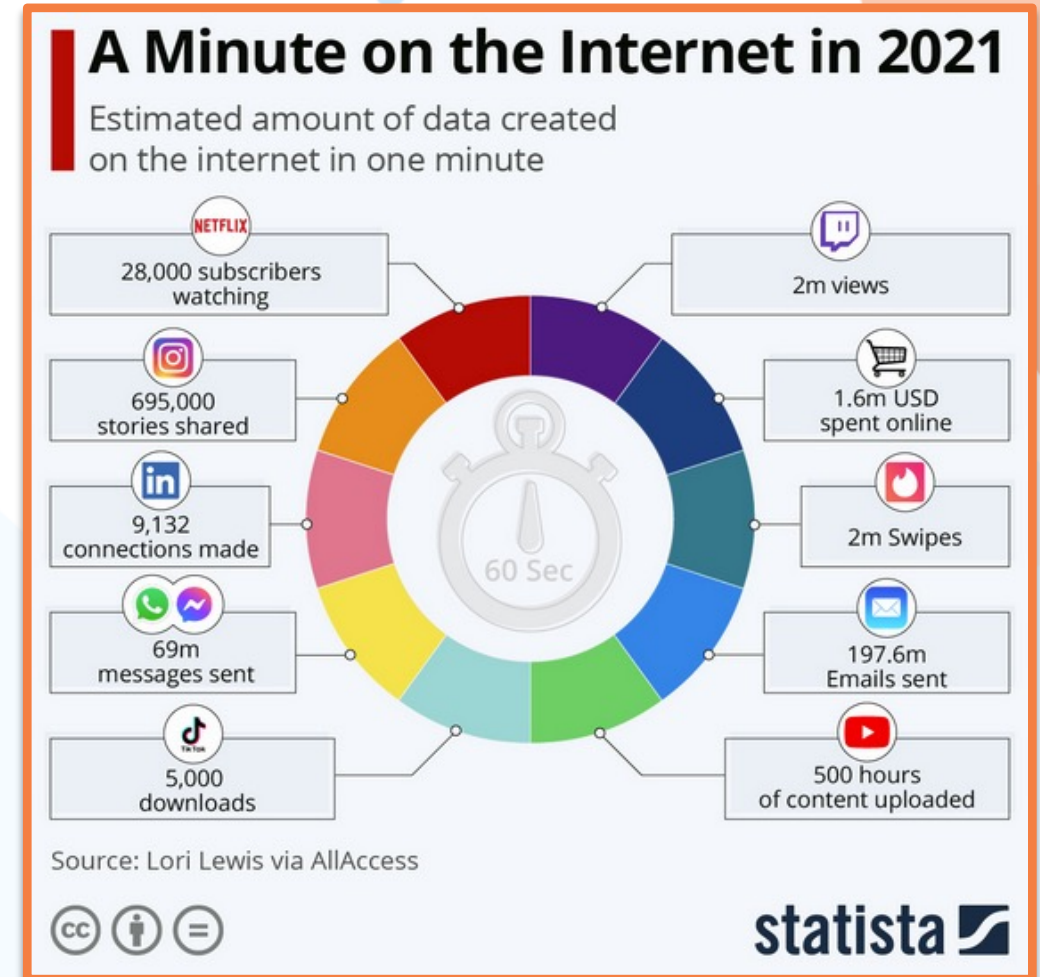
SOURCE:
Data generations stats: WP Dev Shed –
https://wpdevshed.com/how-much-data-is-created-every-day/
A Minute on the Internet in 2021: Statista –
https://www.statista.com/chart/25443/estimated-amount-of-data-created-on-the-internet-in-one-minute/

A Minute on the Internet in 2021
Estimated amount of data created on the internet in one minute

- NETFLIX: 28,000 subscribers watching
- 2m views
- 695,000 stories shared
- 1.6m USD spent online
- 9,132 connections made
- 2m Swipes
- 69m messages sent
- 197.6m Emails sent
- 5,000 downloads
- 500 hours of content uploaded

60 Sec

Source: Lori Lewis via AllAccess

statista

But data can also be a liability...

- What makes data a liability?

  - Privacy frameworks – GDPR, California, etc.

  - Legal – PII, HIPPA, etc.

  - Sharing with 3rd Parties

  - Employee personal data improperly stored.

- Work on determining the value to the organization – and…

- **Destroy the rest!**

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Use Data Governance

- Enables your organization to be more strategic with your data assets.

- Clean data enables analytics.

- Know where your data resides.

- Get consistency in your data. (Example: What is a "member?")

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What is data governance?

- The process of establishing rules and policies about the collection, use and retirement of data within the organization? (SOPs – Standard Operating Procedures)

- Auditing – Initial & On-going

- Maintaining consistency and value over time. (Data Dictionary)

- Reps from across the organization – not just "IT"

People

Data Management

Data Governance

Rules & Policies

Measure & Audit

Data Definitions

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Why is it important?

- At a basic level it is hard to realize value from messy data assets.

- Privacy laws and regulations such as GDPR, California, Virginia, Massachusetts

- Legal implications – be transparent with what you collect and how you use.

- Know what your vendors are doing because you are liable for it.

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Understanding the pieces and players...

- Your stakeholders need **representation** – Data Governance is a council, not an individual (like the CTO).

- Your data needs **stewards** – the association is THE owner, but the steward should have accountability. Avoid the "hot potato" method of ownership.

- You need a **data dictionary**. How to record an Organization name?, What is a member?, What key pieces of information should you collect?

- Your data needs a **play book** – the "rules" – How do you measure freshness? Which system is the master record? How do you use your data in various systems.

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Where do you start?

Establish your "Data Dictionary" and "Data Governance Play Book" which are unique to your association.

- Don't be afraid to start small. Even defining and understanding the demographic fields you collect from members is a useful exercise.

- Build over time.

- Set aside time to meet consistently, small advancements will add up over time.

- Cadence – routine and consistency will make a big difference.

Where do you start?

Audit what you have.

- Look for data sources.
  (Databases, systems, spreadsheets, post-it notes, etc.)

- Different types of data will have different needs.
  For example, source code for a Website is
  different from the member list in your AMS.

- We are focusing on AMS database and
  related systems for this example.

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How do we quality check our data?

- Setup validation views / reports for humans to review. Queries that look for specific conditions which violate the standards

- Part of your auditing process should be finding ways to introduce validation in real-time.

- Think beyond your core CRM. Most CRMs have a numeric unique identifier, but many systems outside (like community or LMS) might use email as a unique identifier.

- There are a growing number of AI tools which should be investigated to help locate and clean data.

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This is a process – not a destination.

- Set your cadence for keeping things current.

- Train users on the rules. Foster staff wide responsibility for improvement.

- Audit what is happening.

- Ability to evaluate your process and build automation to constantly evaluate progress.

- Review rules annually to keep things up to date.

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Think Strategically – Data Becomes an Asset

- Do you have the right data being collected?

  - If not, devise a plan to collect it.

  - Use natural touch-points with users to invite data sharing. (HINT: It's not during the create account process.)

- Determining the "value" of your data strategically. Purge data with no value.

- Communicating your strategy and intent – get departments on board.

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Using your shiny new CLEAN data...

- Consistent data builds value

  - Know who your people are.

  - Keep duplicates to a minimum

  - Avoid data silos that give you blindspots.

  - Understand their engagement.

- Market to them based on their data.

- Use data to improve engagement.

- Use engagement to drive revenue.

Different Departments = Different Needs

- **Marketing** may think of data as emails and clicks.

- **PAC** thinks of data as contributors.

- **Advocacy** still values a member's location.

- **Education** thinks of data as learners taking classes or pursuing certifications.

- **Membership** wants joins, rejoins, market share.

- **Sales** wants potential sponsors.

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Other Questions?

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