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INDUSTRY TRENDS
THE DATA MANAGEMENT CYCLE

The Data Management Cycle

Written by Wes Trochlil

Recently an association contacted me asking for help with how they manage the data in their database. From a marketing perspective they were less-than-pleased with what they were getting from their database. They thought that perhaps they needed a new association management system in order to improve their marketing abilities.

But before they jumped to this expensive (and possibly incorrect) solution, I needed to be sure they understood that managing data in a database is a process, not an event.

Broadly speaking, there are three areas of data management:

- **Collection** – Finding new prospects, sale transactions
- **Active Management** – reviewing and updating data to ensure its accuracy.
- **Querying/Reporting** – using the data for communicating, marketing, reporting (e.g., badges, lists, statistics).

Everything falls under these categories. This is a cycle, as illustrated below:



Understanding these three primary elements of data management can help troubleshoot when we have data management issues. Using these three broad areas as the basis for our discussion can often help determine why we're having this trouble.

The first set of questions revolves around "collection." Are we actually collecting the data we need in order to better target our marketing? At a minimum, we typically know where are members live (i.e., their address), what type of member they are, and how long they've been a member. Is this enough information to target our

marketing? Or do we need more info, like gender, age, purchase history, or other demographics? If we do, are we collecting those now?

The second set of questions revolves around active management. Assuming we have the data we need [collection], we now need to know if we're actively managing this data. That is, is our data accurate and complete? Do we have an accurate address and email? Are their demographics up-to-date?

The third set of questions revolves around querying and reporting. Assuming we have the data we need [collection] and we know it's up-to-date [active management], the last step is actually being able to pull that data from the database. Can we easily query the database for any member of a certain member type, with an email address in the state of Florida? Once we pull this query, can we easily "dump" the data to an electronic file for use in a broadcast email or for printing labels to send snail mail?

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Understanding that data management is a process, rather than an event, can help you manage your data more effectively and provide you with tools to troubleshoot data management challenges. Returning to the association, once we discussed these three areas, we determined that their marketing challenges actually lay in two of the three areas: active management and querying/reporting. In the area of active management, the association was not actively updating existing data on its members, and therefore when data was pulled from the database, it was often incorrect or out-of-date. Addressing this issue meant changing how the association managed the data once it was captured in an initial transaction.

And in the area of querying and reporting, the database tools available to the staff required a higher-level of skill than the average user had, and thus made querying the database very difficult. With the purchase of a new querying tool (much less expensive than buying a new database management system), staff is now able to do much more effective querying.

The end-result is that the association now has the tools in place to execute the kind of marketing they've always wanted to, without the expense and pain of acquiring a new association management system (which could have cost them several hundred thousand dollars). Understanding that data management is a process, rather than an event, helped them achieve this.

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About the Author

For more than 20 years, Wes Trochlil has worked in and with dozens of associations and membership organizations providing a range of consulting services, from general consulting on data management issues to full-scale, association-wide selection and implementation of association management systems. Follow Wes on Twitter @westrochlil. His website is www.effectedatabase.com

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