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INDUSTRY TRENDS
**MARRYING TECHNOLOGY
AND MISSION**

Marrying Technology and Mission

Written by Wes Trochlil

Successful data management systems are like well-constructed wedding cakes. Imagine a traditional wedding cake: there are several layers, with the bottom section being largest, and each layer successively smaller.

There may even be plastic pillars separating the layers. At the very top of the cake stands a model of the bride and groom. The cake represents the foundation of the relationship, and the bride and groom stand proudly at the top of that foundation.

The cake would look pretty ugly, or wouldn't stand at all, if the layers were out of order, or if certain layers were missing. The cake needs to have every layer, and each in the correct spot.

The success of your data management system is like that wedding cake; the top of the cake are happy customers, but below that is each layer of the system, supporting that success. So what are the layers that make for a successful data management system?

- Organization mission – This is the foundation of everything your organization does. So the mission of the organization has to be clear before we can begin to address what kind of data we need to manage and how we need to manage it.
- Objectives – What are we trying to accomplish with our data management system? Are we trying to reduce staff labor? Improve customer service? Without clear objectives (and measures for achieving those objectives) any system will get us there, because we don't know where we're going.
- Business Rules – These rules guide how we do business. How do we sell our products and services? Do we provide discounts? Do we offer refunds? Without clearly established business rules, we'll never know if we're using the system properly or not.
- Data Management Software – Here is where we see the pillars. Only after the mission, objectives, and business rules are established can we insert the software pillars into our cake. But the software is really just a tool to hold up the rest of the cake. Software alone won't make us successful. We still need two more critical layers?
- Documentation – While we may have agreed on the business rules, if we haven't written them down, they are only as good as the staff that can remember them. Documenting your business rules will allow all staff to see what the rules are and will minimize he-said/she-said discussions about how we actually do business. Note that documentation comes before training. Effective training cannot occur until we've established our business rules and how we're going to process data in the software.
- Training – Training is near the top of the cake, because everything below it must happen first, in order for training to be successful. Too often we assume that the problem with our data management systems is a lack of training, when in fact what we're missing is the layers below training: documentation and clear business rules. And training will not be effective without clearly established business rules and documentation for staff to refer to following training.
- Success – Finally, with all of our layers in place, we have data management success. And with that success comes happy customers.

So, how does your database wedding cake look? Are all the layers there? Are some layers out of order? Have you tried to insert the software pillars in the wrong place?

The long-term success of your data management system depends on having all the layers of your cake in place, and having them in the right order. Using this model you can identify where your cake is lacking and address those issues. Happy baking!

About the Author

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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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Data Management Cake

