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Breaking free from the pain and risk of data silos & duplication

The importance of understanding your data's single source of truth

SPINDOGS



What are we going to cover?

- Data Silos and Data Duplication
- The concept of the single source of truth
- Real world examples
- Take aways and questions

Why is this important?

70% of Membership Organisations
somewhat agree/agree there is a reliance
on data to operate more effectively....

...only 28% agree they have all their
critical systems integrated

70% of Membership Organisations
also confirm that member data is
used to make important decisions /
validate key assumptions.....

...yet only 8.5% have actually defined and documented the meaning of key data elements and only 13% of membership bodies consider their staff to have confidence in the accuracy of available data

Jargon busting

Data Silos

What are data silos?

Why can data silos be a problem?

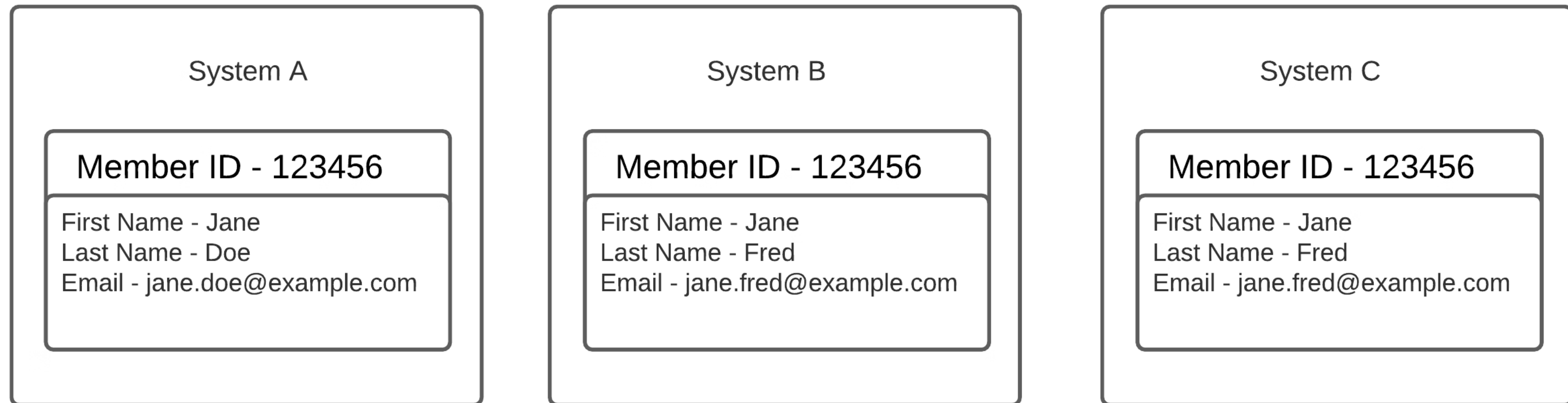
Data Duplication

What is data duplication?



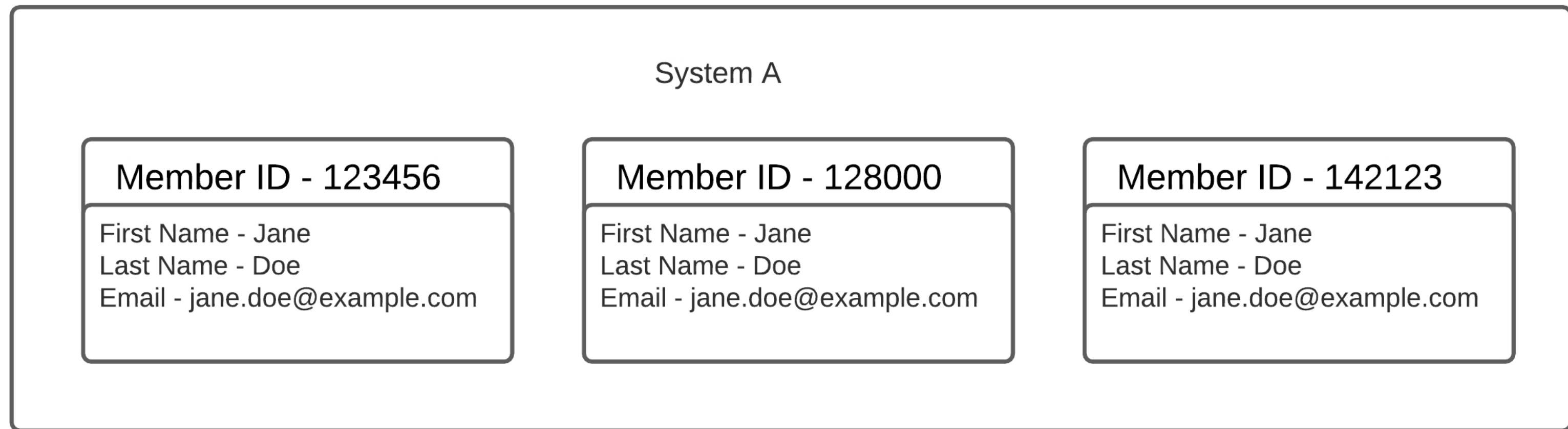
Why can data duplication be a problem?

3 different records in different systems for Member ID - 123456



Why can data duplication be a problem? (cont.)

3 different Member IDs in one system but are these the same person?



Why do data silos and data duplication occur?

- Success!
- Organisational Structure
- SaaS products / Specialist applications

Costs and risks of data silos and data duplication in membership organisations

Risks

Poor experience across the end-to-end customer journey

- Irritating customers
- Missed renewals
- Poor customer service
- Brand reputation

Internally

- Incorrect information informing decisions
- Data security
- Inaccurate reporting





Costs

- Inefficient use of limited internal resource
 - Duplication of effort
 - Additional communication
- Paying for redundant IT/application infrastructure and/or storage costs
- Cost of emailing/posting

Right, that's it, let's outlaw data silos and data duplication!

Not so fast! When part of a cohesive data strategy there can be scenarios where data silos and data duplication can be appropriate!



Where silos and duplication can be appropriate

Data Silos

- Highly sensitive information

Data Duplication

- Ensuring you are using the most cost effective / appropriate tools for different tasks.
- Can be required for performance
- Can be required for functionality

But you just said data silos and data duplication is bad, so how do we start to manage this better?

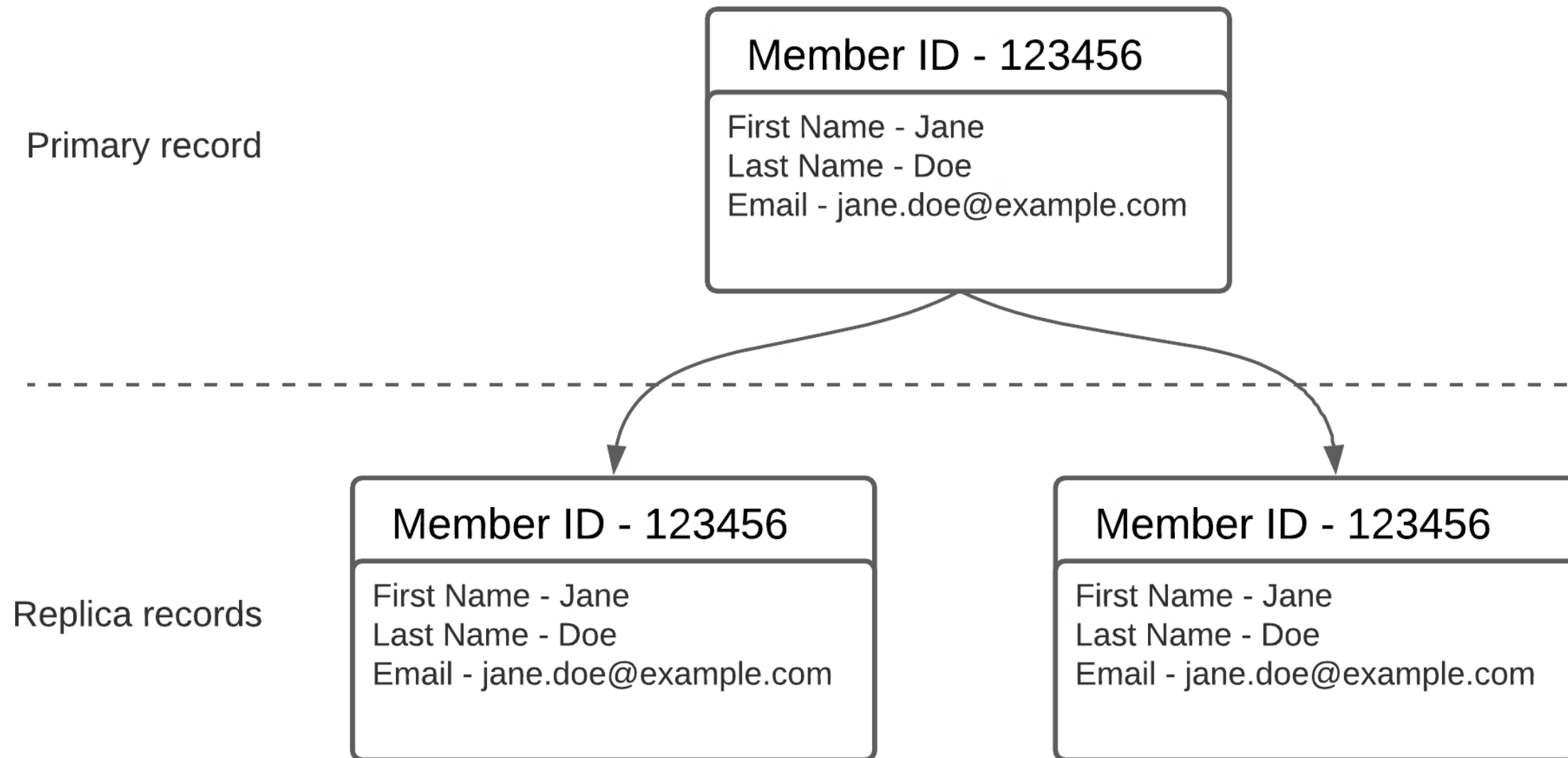
Understanding the single source of truth for your data

What is the single source of truth?

The aim is to ensure that every data element is only ever edited in one place.



Primary and replica records



Quick poll

Does your organisation hold data in
different sources?

How understanding your data's single
source of truth informs decisions & digital
transformation

Getting a holistic view

The first step is to get a list the different systems used within your organisation and detail the different data held within them and outline, in each system, whether the data is read only or editable.

Ensure that the list of systems are cross referenced with your finance team, you might still be paying for other systems that no-one actually uses anymore!

The deep dive

Once ready you can decide an appropriate time to do a more detailed deep dive into this and go into more granular data fields “Member email”, “Member first name”, etc and repeat the exercise.



What we are trying to discover

1. Understand what systems are being used to update records
2. Review access rights to these systems
 - a. Ensure people have appropriate access to update the primary records
 - b. Try to reduce people who have access to the systems that hold replica records
3. Review capability of these systems
4. Document internally to make it clear where 'primary records' are held
5. Training colleagues and raise awareness to inform and encourage collaboration

More complex subsequent steps

1. Automate syncing replica records from primary records
2. Directly querying primary records (and writing back to them)
3. Reduction in unnecessary duplication and silos
4. Restricting access

Real world examples

Email marketing

Scenario:

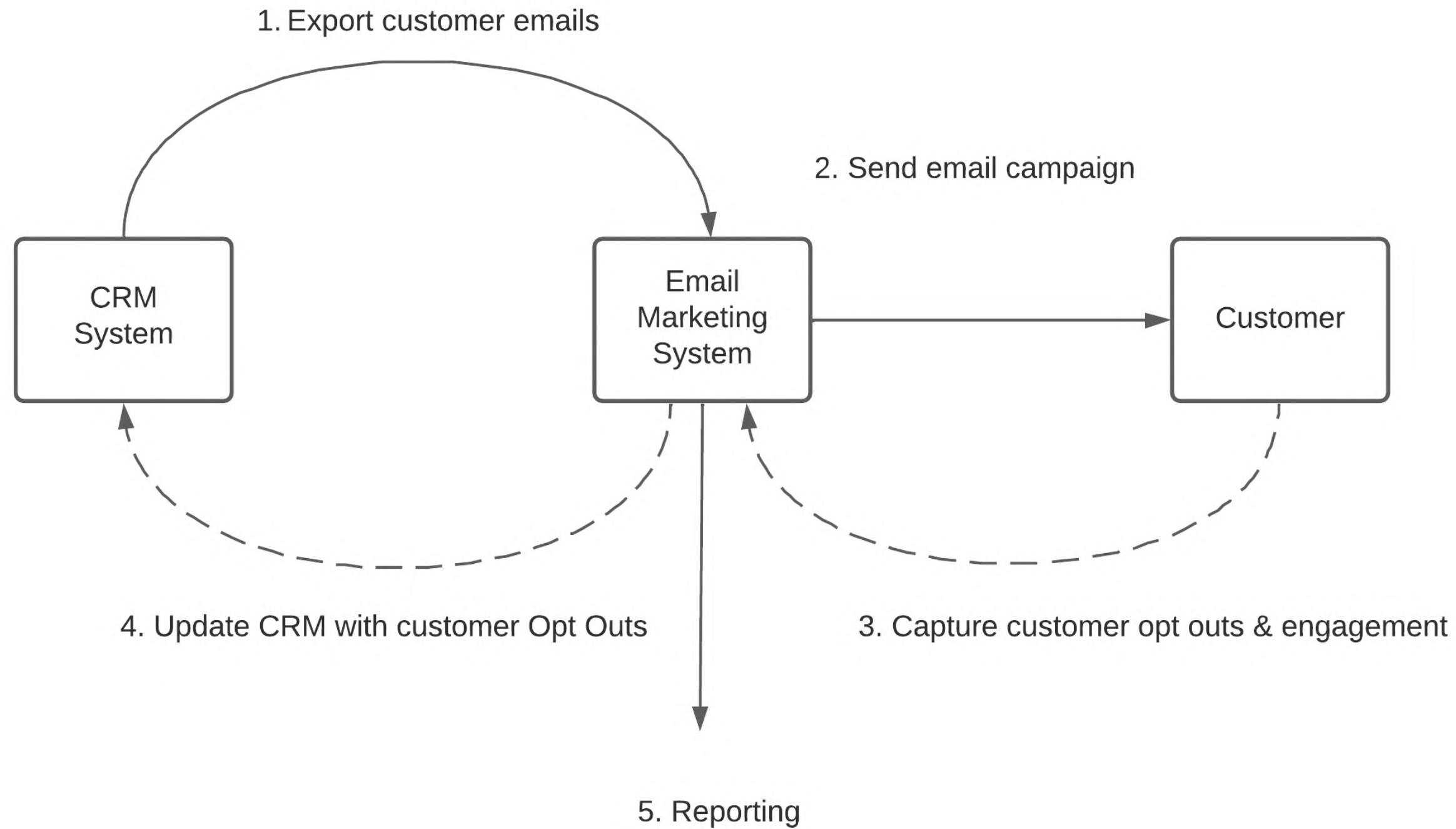
A central CRM / AMS system stores the primary record but there is a more cost effective/better email marketing tool that we want to use.

Data considerations:

- Which system holds the primary record of
 - email
 - marketing preferences
 - opt-in/out



Email marketing (cont.)



Email marketing (cont.)

This is not one size fits all....

- **Option 1** – Opt outs are captured in the email marketing tool and exported back to the CRM to update the master record
- **Option 2** – Unsubscribe options within the email campaign link to a form that writes back into CRM
- **Option 3** [if no other mechanism available to the user to unsubscribe] – Captured in the email marketing tool and the tool prevents anyone already unsubscribed from being sent another email
- **And so on....**

Member events search

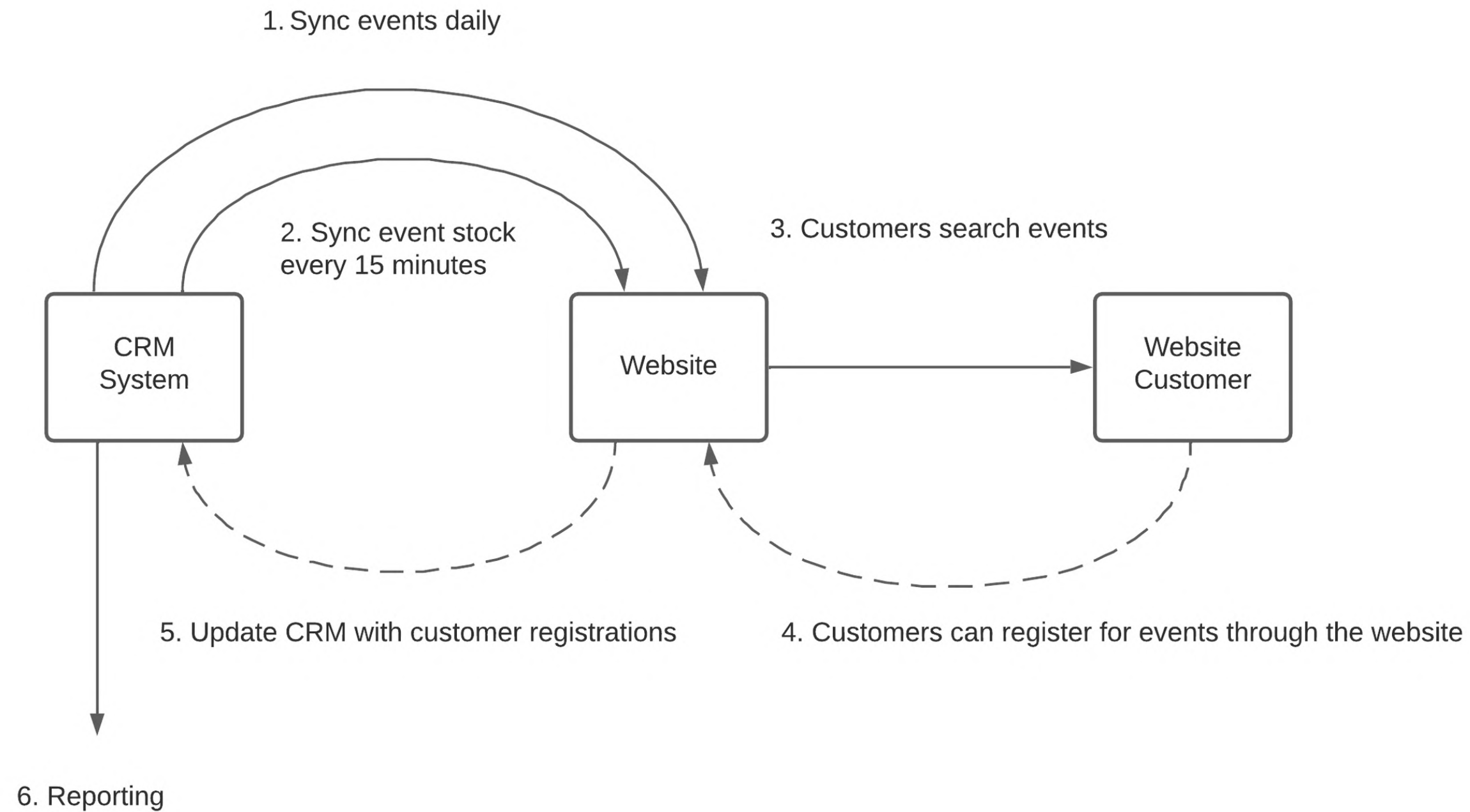
Scenario:

- We want to have searchable member events on our website whereby members can search based on distance, which is not supported by the membership CRM that houses the primary event records.
- The CRM / AMS event search is slow to query for the website taking 10 seconds

Data Considerations:

- The primary records of events are held in CRM / AMS
- The website having up-to-date availability of spaces / stock is really important

Member events search (cont.)

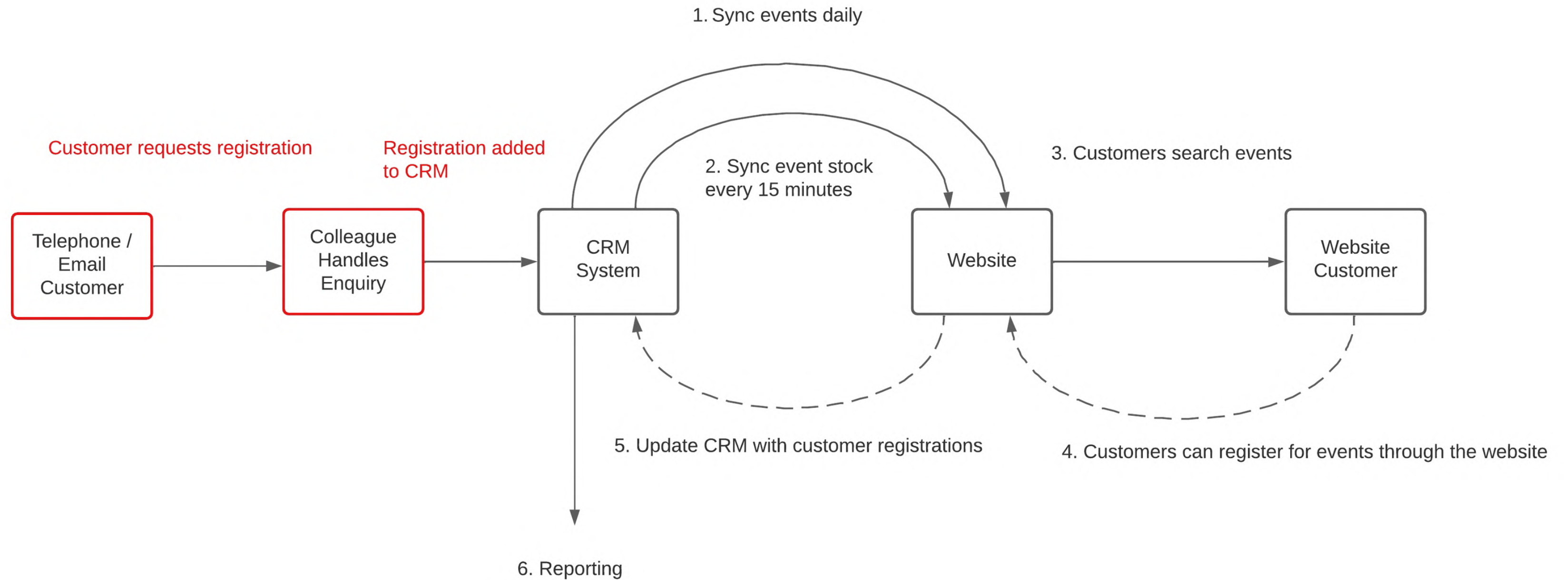


Member events search (cont.)

Advantages of this approach:

- The user experience is not compromised by the CRM / AMS
- Our CRM / AMS always has the latest information

Member events search (cont.)





Actionable outcomes & key takeaways

- Understanding of data silos and data duplication, how they can occur and the costs and risks
- How to get a holistic view of the data within your organisation
- Define the single source of truths
- Inform and educate your colleagues
- Inform future projects and digital transformation
- Reach out to experts where additional support is needed, this is what we do!

Thank you

Any questions?

