



For **Associations** Using QuickBooks™

- ➔ Introductions - Ben and Jenn!
- ➔ Some Down & Dirty Data Facts
- ➔ How To Get Started Cleaning Your Data
- ➔ Tools You Can Use to Keep Your Data Clean



Hi! I'm ...

Ben Bullock

Director of Operations



Hi! I'm ...

Jenn Norman

Director of Customer Experience





Dirty Data Facts!

26%



## Dirty Data Facts!

# 26%

On average, companies feel that  
26% of their data is dirty



Dirty Data Facts!

15 - 25%



Dirty Data Facts!

# 15 - 25%

The average revenue loss for a business due to dirty data. Yikes!

Source: MarkLogic. *The Staggering Impact of Dirty Data*





Dirty Data Facts!

So, if your association generates \$750k annually ...

**\$112,500**

In revenue loss at the low end of 15%



Dirty Data Facts!

#1



## Dirty Data Facts!

#1 reason

Number One reason for dirty data is  
Human Error

Source: MarkLogic. *The Staggering Impact of Dirty Data*



You May Be Asking...

What is Dirty Data??



What is Dirty Data?

## 1. Duplicates

## 1. Duplicates

<input type="checkbox"/>	<b>Jenn Norman</b> <i>iLS Network</i>		13506 Summerport Vlg Pwy, Suite 805 Windermere, FL 34786
<input type="checkbox"/>	<b>Jennifer Norman</b> <i>Art Supply Co.</i>		4525 Southwest 13th Street Gainesville, FL 32608 United States
<input type="checkbox"/>	<b>Jennifer Norman</b> <i>iLS Network</i>		101 South Garland Avenue c/o ABC Corporation Tampa, FL 33602 United States



What is Dirty Data?

1. Duplicates
2. Old Data



What is Dirty Data?

## Old Data

A screenshot of a user profile card. The card has a light gray background. At the top right, it says "ILS NETWORK" next to a blue button labeled "New" with a downward arrow. Below that, it says "SUPPLIER/ASSOCIATE" next to a green vertical bar. To the right of the bar, it says "\$0.00 BALANCE". In the center, there is a dark gray button with a green checkmark icon and the text "MEMBER UNTIL 12/31/2021". Below this button, it says "Membership via ILS NETWORK". A large red arrow points from the top left towards the "MEMBER UNTIL 12/31/2021" button.

👁 Last Updated 11/5/2009 by [melanie.dupont@noviams.com](mailto:melanie.dupont@noviams.com)





What is Dirty Data?


1. Duplicates
2. Old Data
3. Inconsistent/Silo'd data


novi AMS<sup>®</sup>

What is Dirty Data?

Inconsistent/Silo'd data

Data →  intuit quickbooks<sup>®</sup>

Data →  MailChimp

Data →  AMS



## What is Dirty Data?

1. Duplicates
2. Old Data
3. Inconsistent/Silo'd data
4. Incomplete



What is Dirty Data?

# Incomplete Data

The screenshot shows the NOVI AMS interface. On the left is a dark sidebar with navigation items: Members, Accounting, Static Content, Events, Ecommerce, Blog, and Reporting. The main content area has a header with a '+' button, user 'Jenn Norman', and a 'Help' link. Below the header is a section titled 'Missing Primary Contact' with an 'Edit' button. A table below this section has two columns: 'NAME' and 'COMPANY PRIMARY CONTACT CUSTOMER NAME'. The table contains five rows of data, with the second column being empty for all entries.

NAME	COMPANY PRIMARY CONTACT CUSTOMER NAME
1 Harvey Place LLC	
123 ABC Company	
123 Simplicity Co.	
24 Hour Protection Services	
3CM Multifamily	



## What is Dirty Data?

1. Duplicates
2. Old Data
3. Inconsistent/Silo'd data
4. Incomplete
5. Inaccurate Data



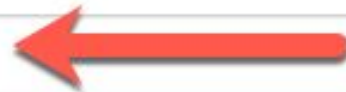
What is Dirty Data?

## Inaccurate Data

### Contact Information

Email

24hourps@test.cot



Phone

USA/Canada?

1800-ASK-GARY



Mobile

International?



You May Be Asking...

## What is Clean Data?

**klēn 'dadə:** Data that is regularly updated and processed to remove inaccuracies or incomplete information.



You May Be Asking...

With so many ways that data can become dirty, how on earth can I keep it clean AND do my other work?





Let's Clean it up!



## Prioritize - *Revenue Driving Data*

#1 Data that affects your Dues Revenue

- a. Custom Fields used to Equate Your Dues
- b. Billing Addresses
- c. Billing Contacts



Let's Clean it up!



## Prioritize - *Revenue Driving Data*

#1 Data that affects your Dues Revenue

- a. Custom Fields
- b. Billing Addresses
- c. Billing Contacts

#2 Data Used to Sell Products or other Services

- a. Custom Fields
- b. Personal Preferences



Let's Clean it up!



## Segment Your Data

1. By Member Type
  - a. "Nonprofit" Member Type
  - b. "Philanthropic Partner" Member Type
  - c. And so on...
  
2. By Member Status



You May Be Asking...

# How Often Should I Clean Data?



Let's Clean it up!



**Well, this will vary but...**

1. Weekly - 15 min
2. Monthly - 1 Hour
3. Quarterly - 2 - 4 Hours

*Tip: Put it on your calendar just like you would any meeting. Remember, dirty data costs you \$\$\$.*



You May Be Asking...

What Tools Can I Use to help me  
Clean My Data?



Let's Clean it up!



# Data Clean Up Tools

## 1. Reports

Missing:

- "X" Custom Field
- Billing Contact
- Billing Address
- Last updated greater than X days ago



Let's Clean it up!



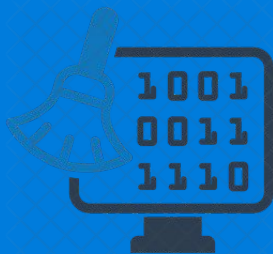
## Data Clean Up Tools

1. Reports
2. Use Your Software to Your Advantage



NOVIAMS®

Let's Clean it up!



# Use Your Software to Your Advantage

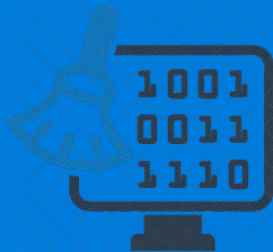
The screenshot shows the NOVIAMS software interface. At the top, the user is logged in as jennifer@noviams.com. The main menu is titled "Association of No Workarounds" and includes sections for Settings, Tools, and Import. The "Tools" section is highlighted with a red box and contains the following items: Audit Logs, DataMaid, QuickBooks Analyzer, and Address Cleanup. Below the menu, there are links for "View Website" and "Sign Out".

The "Address Cleanup" screen is shown below the menu. It features a search bar labeled "Find by name" and a "Filter" dropdown. The main content area is a table with the following columns: NAME, BILLING ADDRESS, SHIPPING ADDRESS, and ACTION.

NAME	BILLING ADDRESS	SHIPPING ADDRESS	ACTION
1 Harvov Place LLC	<input type="checkbox"/> Use Parent Billing Address 5924 North Florida Ave Address (Line 2) Tampa Florida 33604 United Sts	<input type="checkbox"/> Use Parent Shipping Address 5924 North Florida Ave Address (Line 2) Tampa Florida 33604 United Sts County	Copy Billing to Shipping Copy Shipping to Billing Update Address

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Let's Clean it up!



# Use Your Software to Your Advantage

A screenshot of the DataMaid software interface. The interface is for a user named Jennifer (@noviams.com). It features a sidebar with navigation options: Members, Accounting, Static Content, Events, Ecommerce, Blog, Fields, and Reporting. The main content area has the DataMaid logo and tagline "Because Nobody Likes Dirty Data." Below this, a large heading reads "Shhhh! Your dirty data secrets are safe with us." followed by a sub-heading "This is a tool for cleaning up you data in Quickbooks Online." and a list of three benefits: "Clean Customer and vendor records", "Analyze your transactions for common problems", and "Sweep for potential duplicates". A green button labeled "Connect to QuickBooks" is prominently displayed. Below the button, there are two side-by-side address forms. The left form shows a partially filled address: "5924 North Florida Ave", "Address (Line 2)", "Tampa", "Florida", "33604", and "United Stz". The right form shows the same address fully filled in. At the bottom right, there are links for "Copy Shipping to Billing" and "Update Address".



Let's Clean it up!



## Data Clean Up Tools

1. Reports
2. Use Your Software to Your Advantage
3. Be Proactive!
  - a. Get Social - Check LinkedIn
  - b. Send an email to your primary/billing contacts to ensure you have the *correct* email addresses (QuickBooks and Your Email Provider)
  - c. Email/Message Your Members and Prompt them to Update Their Info



Want A Copy of  
This Presentation?

**Online:** <https://www.noviams.com/amplify/clean-data>

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THANK YOU!



For **Associations** Using QuickBooks™