How non-profits thrive through trustworthy data

PLAYBOOK BY PLAUTI

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A new Era

The world is changing too fast. Industries have had to adapt to entirely new communication channels in a single generation, with several areas to consider. Some industries work for the world of entertainment. Others take care of the health of the population. But others work for the future of society by giving many opportunities to those who need them most. Getting the most out of new high-quality data is imperative. Non-profit organizations must embrace technology through data cleansing to reach people in need effectively and efficiently.

For this industry to succeed, it needs to reach the right audiences. Identifying these groups can be challenging, and generating new opportunities is difficult. Therefore, it is vitally important that these organizations ensure excellent database management, hence optimal follow-up. The reality is that human talent is not enough; they can only achieve their goals with help from technology, working under a hybrid structure.

But how can technology help personnel trust their data and get more donations? In this Playbook, Plauti shares how non-profit organizations can ensure they have reliable data in just five steps.

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1 Know where the records come from

Non-profit organizations work with many communication channels compared to other industries. This happens digitally and analogously. Organizations still capture data through webinars, online fundraisers, and in-person agents, who still opt for the traditional duty of stopping people in shopping malls. These entities must have full knowledge of where the data is coming from. While this still does not solve the problem, it does help to have control over incoming information to lay the groundwork. It is, therefore, essential to categorize each of these entries.

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Having a native and digital space helps organizations keep all these data in one place. Cloud services undeniably required, such as CRMs (Customer Relationship Management). Entities need solutions that allow them to store large volumes of data. It is certainly not advisable to choose to rely on paper. Digitizing may sound time-consuming and complicated. However, using the right solution creates a better overview preventing possible drawbacks.

2 Validate the information

For agents to be able to provide follow-up, they need to have accurate data. They can make calls, emails, and letters, among others. While this human talent dedicates time to planning and decision-making, AI ensures data quality, therefore, functionality. Platforms that read the records and verify them do exist. Many companies already make use of them. By verifying any data record from the beginning, organizations can know whom to contact and how to do it. Whether semi-automatic or automatic, this creates valuable and usable data.

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Standardize under a single format

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Records coming in through multiple channels will likely be presented in different formats. This used to be an issue. All departments within a non-profit organization need their databases to communicate with each other — “Pears to pears and apples to apples.”

Standardizing records gives the data direction. This action saves agents and administrators time and effort, regardless of the records' country of origin, languages, labels, or data usage.

4 Identical records

One of the most common challenges in the industry. Having multiple contacts for the same donation is expected. Because several people are involved, detecting duplicates at the point of entrance is almost impossible using analog tools. In addition, opting for digital platforms makes reaching goals easier for the team and companies. Integrated solutions detect the existence of identical records in the databases and give personnel multiple options depending on the case (Delete, Merge, etc.). First, it will ensure that the data is good or junk before taking action.

A duplicate-free database guarantees that the business records everything discussed with the donor. This way, there will be no room for double versions or ghosted follow-ups.

Handle bulk data 5

All the previous steps sound simple regarding one or two registrations. But what about bulk data entry? As mentioned in the first step, organizations need practical, easy-to-interpret, and user-friendly platforms to handle bulk data. These make it easy for agents and administrators to search, organize and modify large volumes of data—especially given the volume of daily donors and events. In addition, this should be done in the shortest possible time without the need to jump from application to application.

Conclusion

In the future, organizations may need to upgrade databases or migrate workspaces. Besides the fact that it is not a safe option, jumping from app to app to run a job takes too much time. Valuable information is even lost in the process. Native solutions allow non-profit organizations to perform all actions in one place. Giving them the option to customize the way they look and function.

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