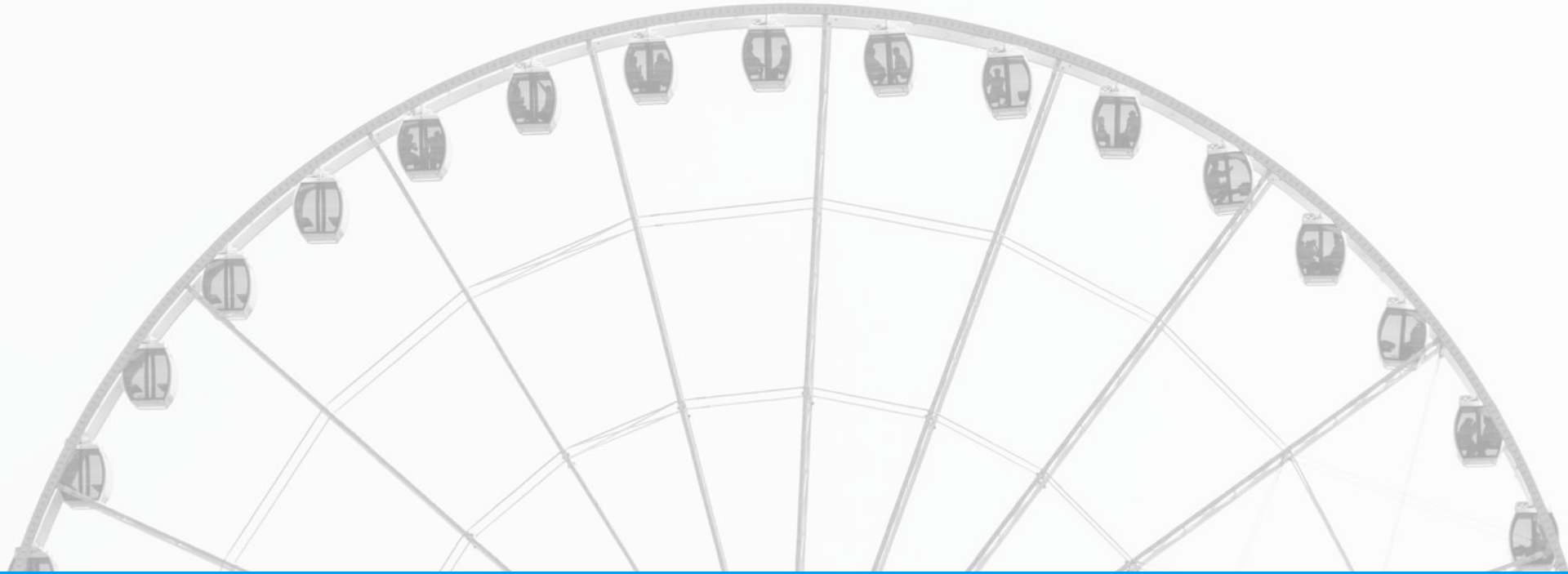
TouchPoint

What's the Point...

of Tidying Your Database?

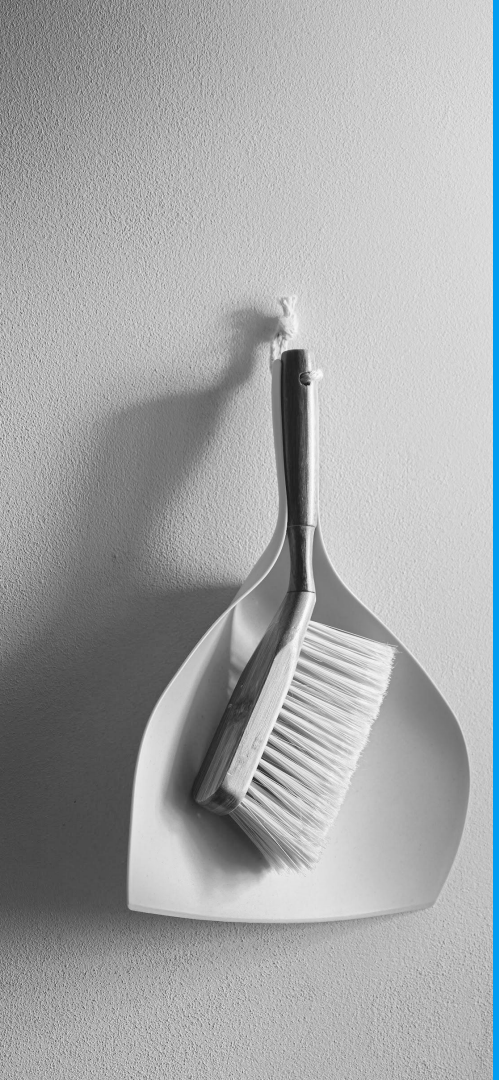
January 27th - 2pm Central



Presenters

Michael Faulkner
Vice President, Solutions

Hayley Whitworth
Director of Education
and Content



Housekeeping

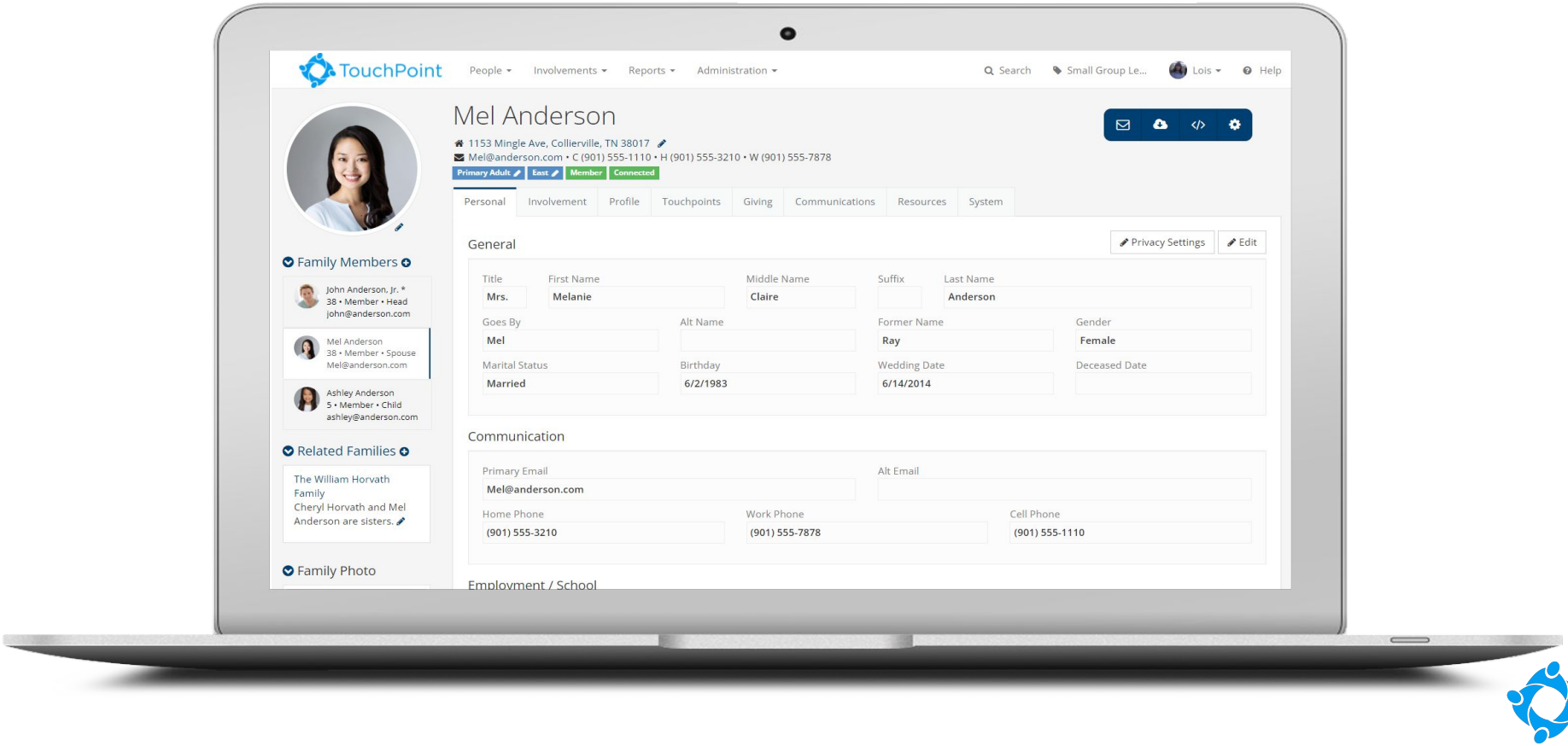
Submit Questions using Q&A Button in Control Panel

Agenda

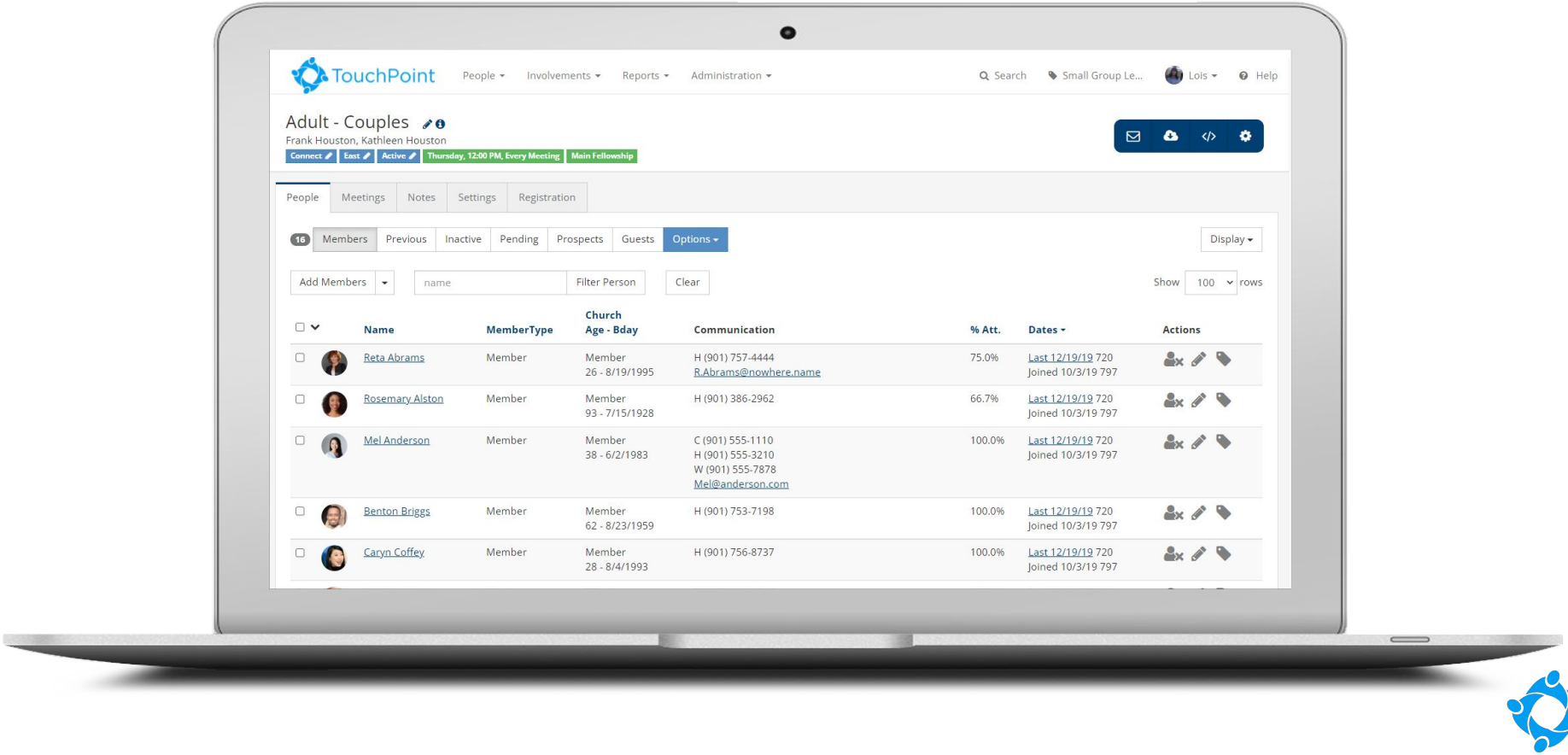
- What Constitutes “Clean Data”?
- What Causes Data To Be Untidy?
- How To Audit Your Data
- Processes & Ongoing Maintenance

What Constitutes “Clean Data”?

Clean People Record



Clean Involvement



What Causes Data To Be Untidy?

Common Church Database Complaints

"We have too many duplicate records!"

"We don't know if we're reaching the right people with the right message."

"So many of our emails bounce!"

"Our data is old and we don't have a way to get new information."

Untidy Data

Registrations

Human Error

Bad/Missing Processes

Members Unable To Update Information

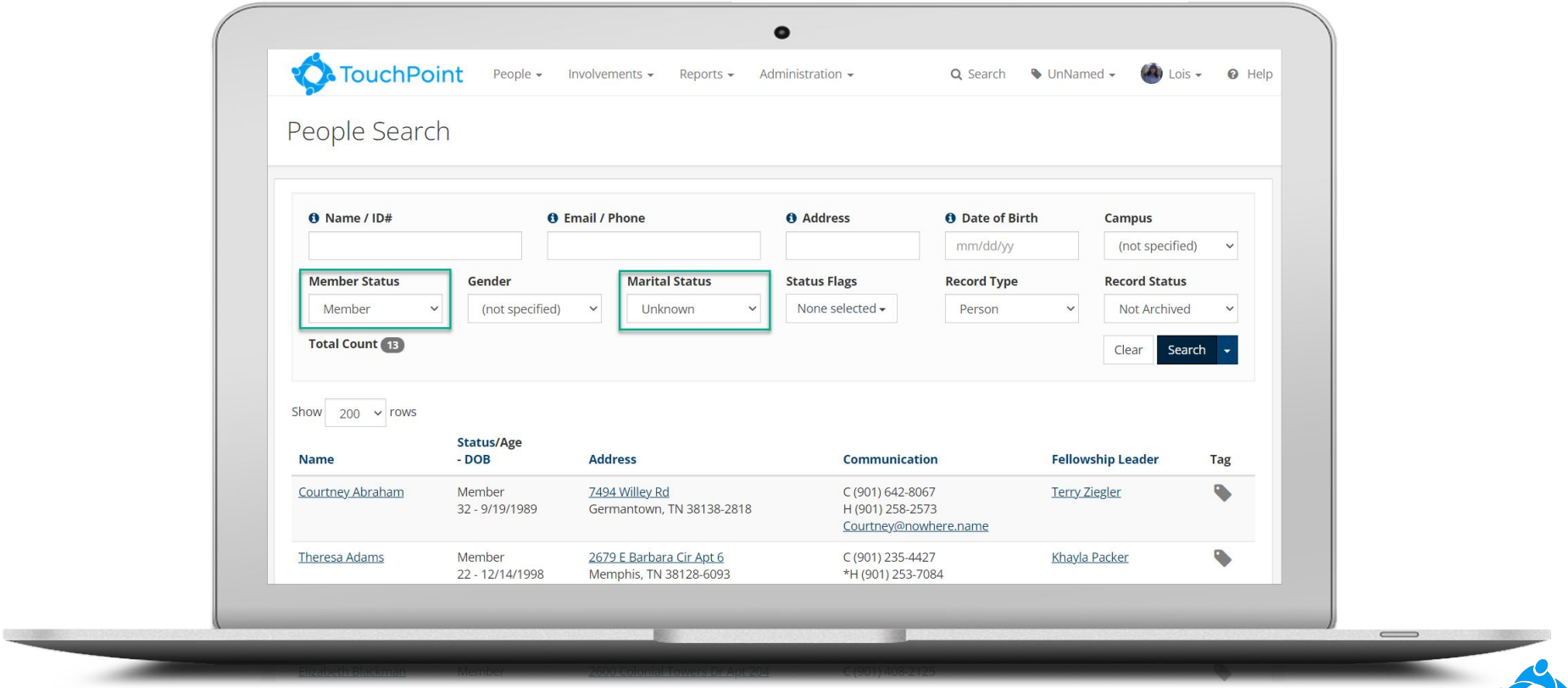
Data Silos

Inactive People

Recycle Involvements

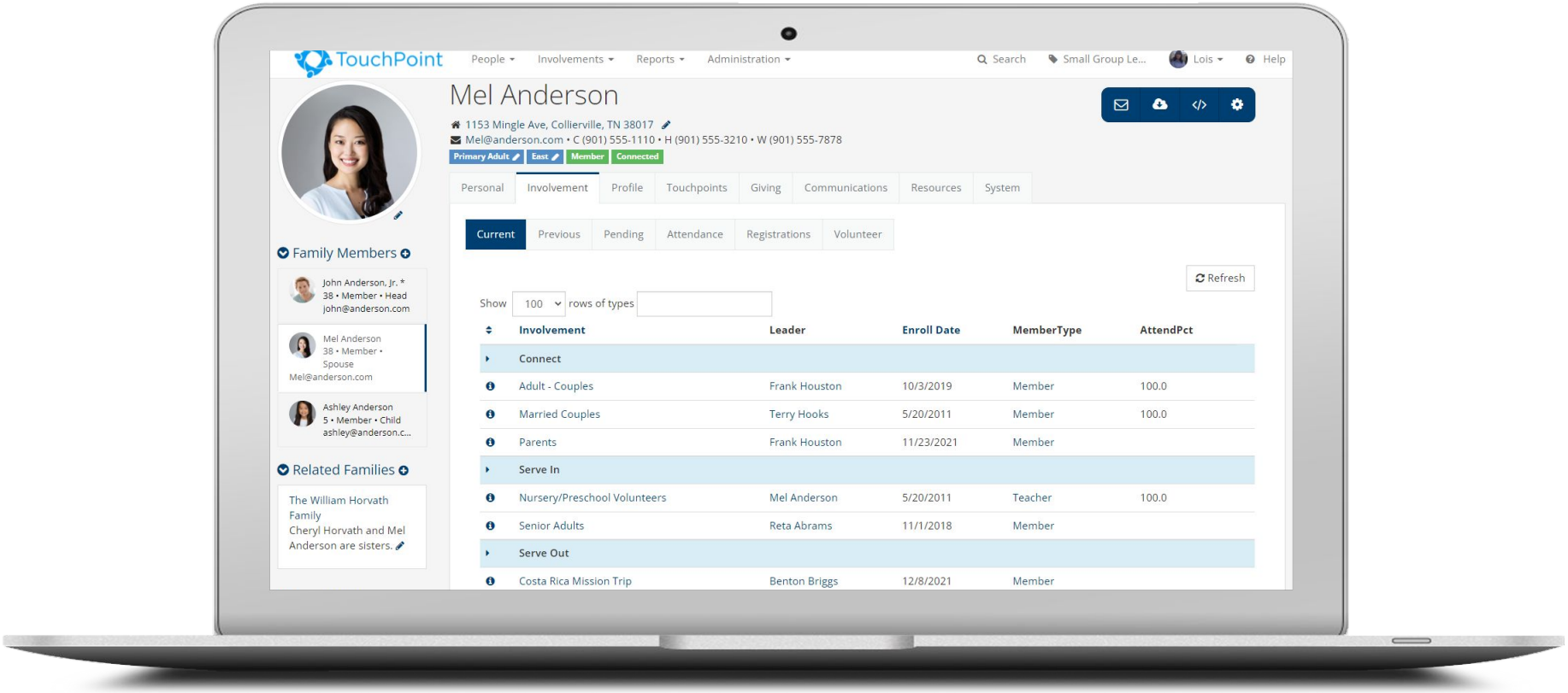
Database Audit

People Record Audit



Involvements Audit

- Status (Active versus Inactive)
- Programs & Divisions
- Involvement Type


TouchPoint
People
Involvements
Reports
Administration
Search
Small Group Le...
Lois
Help
Mel Anderson
1153 Mingle Ave, Collierville, TN 38017
Mel@anderson.com • C (901) 555-1110 • H (901) 555-3210 • W (901) 555-7878
Primary Adult
East
Member
Connected
Personal
Involvement
Profile
Touchpoints
Giving
Communications
Resources
System
Current
Previous
Pending
Attendance
Registrations
Volunteer
Refresh
Show 100 rows of types
Involvement
Leader
Enroll Date
MemberType
AttendPct
Connect
Adult - Couples
Frank Houston
10/3/2019
Member
100.0
Married Couples
Terry Hooks
5/20/2011
Member
100.0
Parents
Frank Houston
11/23/2021
Member
Serve In
Nursery/Preschool Volunteers
Mel Anderson
5/20/2011
Teacher
100.0
Senior Adults
Reta Abrams
11/1/2018
Member
Serve Out
Costa Rica Mission Trip
Benton Briggs
12/8/2021
Member
Family Members
John Anderson, Jr. *
38 • Member • Head
john@anderson.com
Mel Anderson
38 • Member • Spouse
Mel@anderson.com
Ashley Anderson
5 • Member • Child
ashley@anderson.c...
Related Families
The William Horvath Family
Cheryl Horvath and Mel Anderson are sisters.

Lookup Codes Audit

- **People**: Resident Codes, Titles
- **Involvements**: Entry Points
- **Tasks & Notes**: Keywords

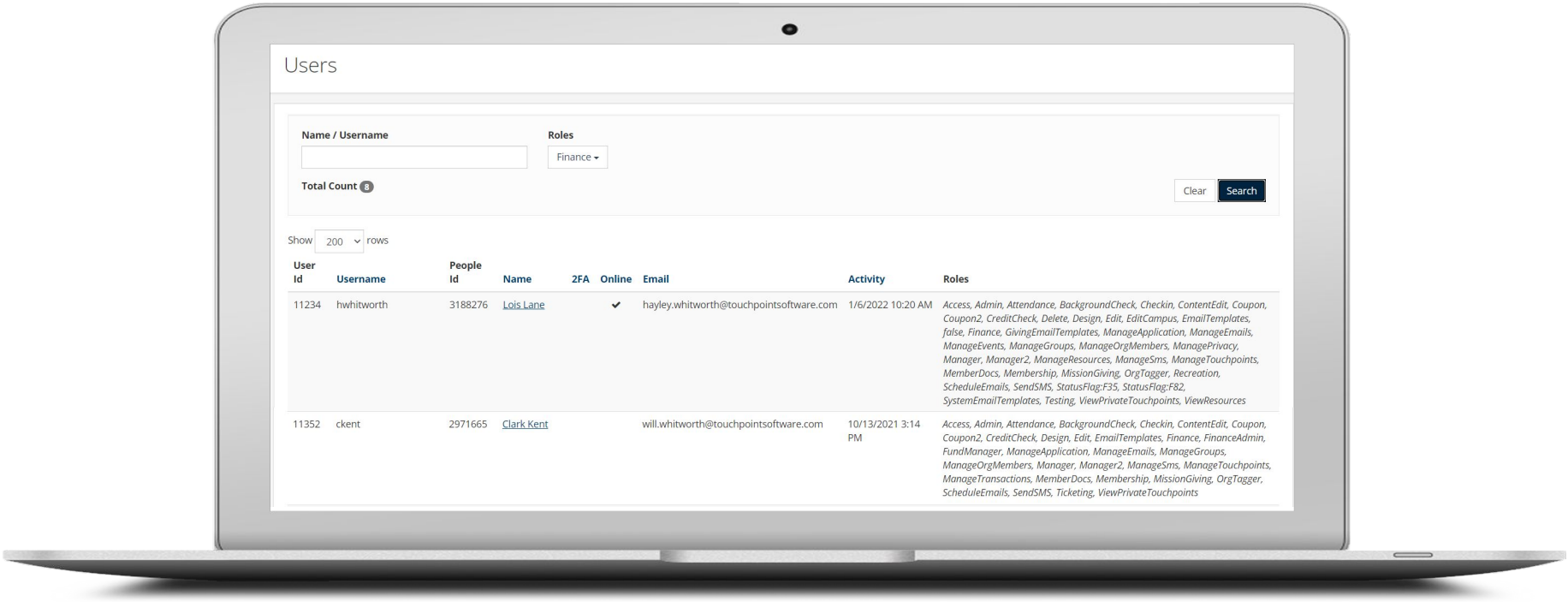
Communications Audit

- Templates: Special Event, By Ministry, For Generic Communications
- SMS Groups
- SMS Reply Words

Extra Values Audit

- People Record - EVs, Profile, Member, and Entry Tabs
- Involvements
- Extra Value Summary Reports

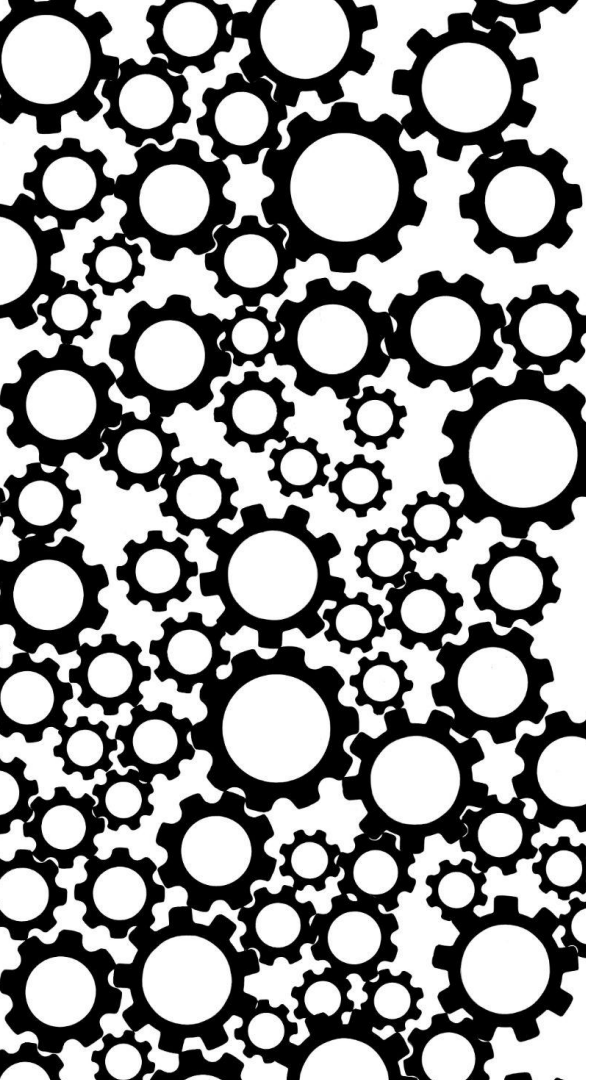
User Roles Audit



User Role Settings Update

- Admin Mail
- New People Manager

Processes & Ongoing Maintenance



Processes & Ongoing Maintenance

Standards For Data Input

Have A Plan For Incoming Data

Audit Database

Stress Ministry Opportunities

Search For Duplicates

Ask Congregation To Update Records

Thank You!

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