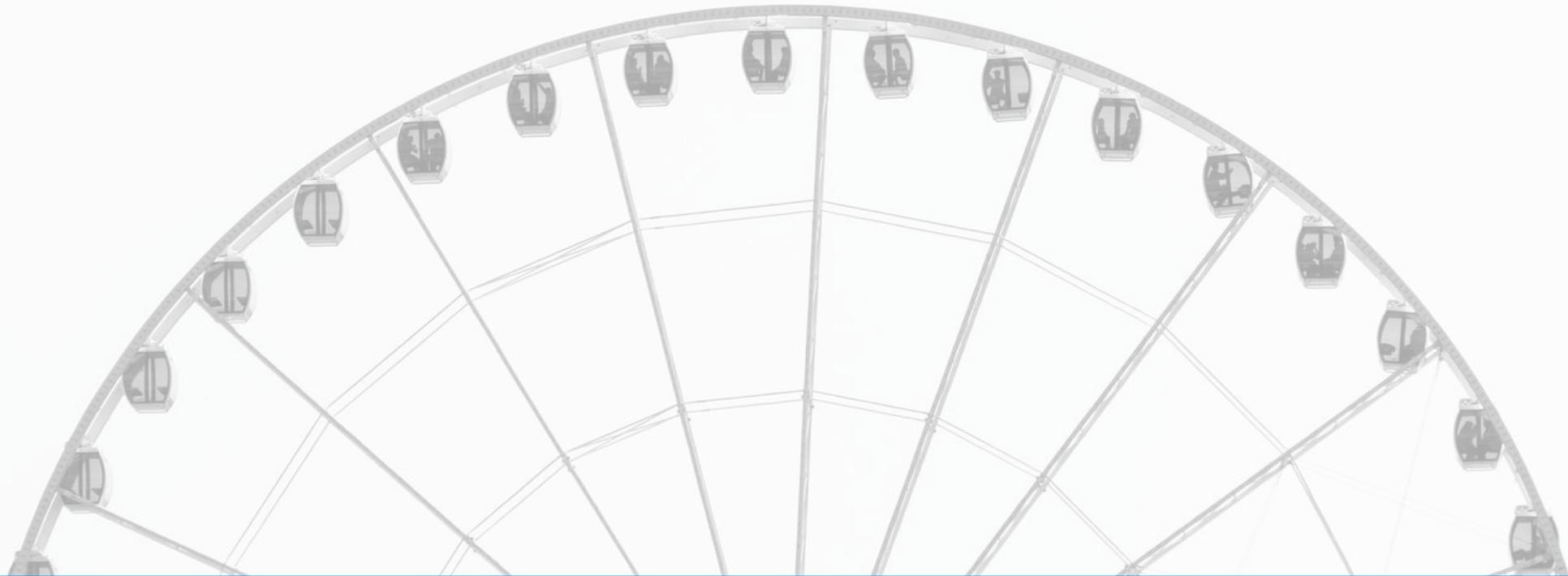


What's the Point...

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

The screenshot displays the TouchPoint software interface for a user profile. The top navigation bar includes the TouchPoint logo, menu items for People, Involvements, Reports, and Administration, a search bar, and user information for Lois. The profile is for Mel Anderson, located at 1153 Mingle Ave, Collierville, TN 38017, with contact information Mel@anderson.com and phone numbers (901) 555-1110 and (901) 555-7878. Her roles are listed as Primary Adult, East Member, and Connected. The profile is divided into several tabs: Personal, Involvement, Profile, Touchpoints, Giving, Communications, Resources, and System. The General tab is active, showing fields for Title (Mrs.), First Name (Melanie), Middle Name (Claire), Suffix, Last Name (Anderson), Goes By (Mel), Alt Name, Former Name (Ray), Gender (Female), Marital Status (Married), Birthdate (6/2/1983), Wedding Date (6/14/2014), and Deceased Date. The Communication tab shows Primary Email (Mel@anderson.com), Alt Email, Home Phone ((901) 555-3210), Work Phone ((901) 555-7878), and Cell Phone ((901) 555-1110). On the left sidebar, there are sections for Family Members (John Anderson, Jr., Mel Anderson, Ashley Anderson), Related Families (The William Horvath Family), and Family Photo.

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

General ✎ Privacy Settings ✎ Edit

Title	First Name	Middle Name	Suffix	Last Name
Mrs.	Melanie	Claire		Anderson
Goes By	Alt Name	Former Name	Gender	
Mel		Ray	Female	
Marital Status	Birthdate	Wedding Date	Deceased Date	
Married	6/2/1983	6/14/2014		

Communication

Primary Email	Alt Email		
Mel@anderson.com			
Home Phone	Work Phone	Cell Phone	
(901) 555-3210	(901) 555-7878	(901) 555-1110	

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.com

Related Families ⊕

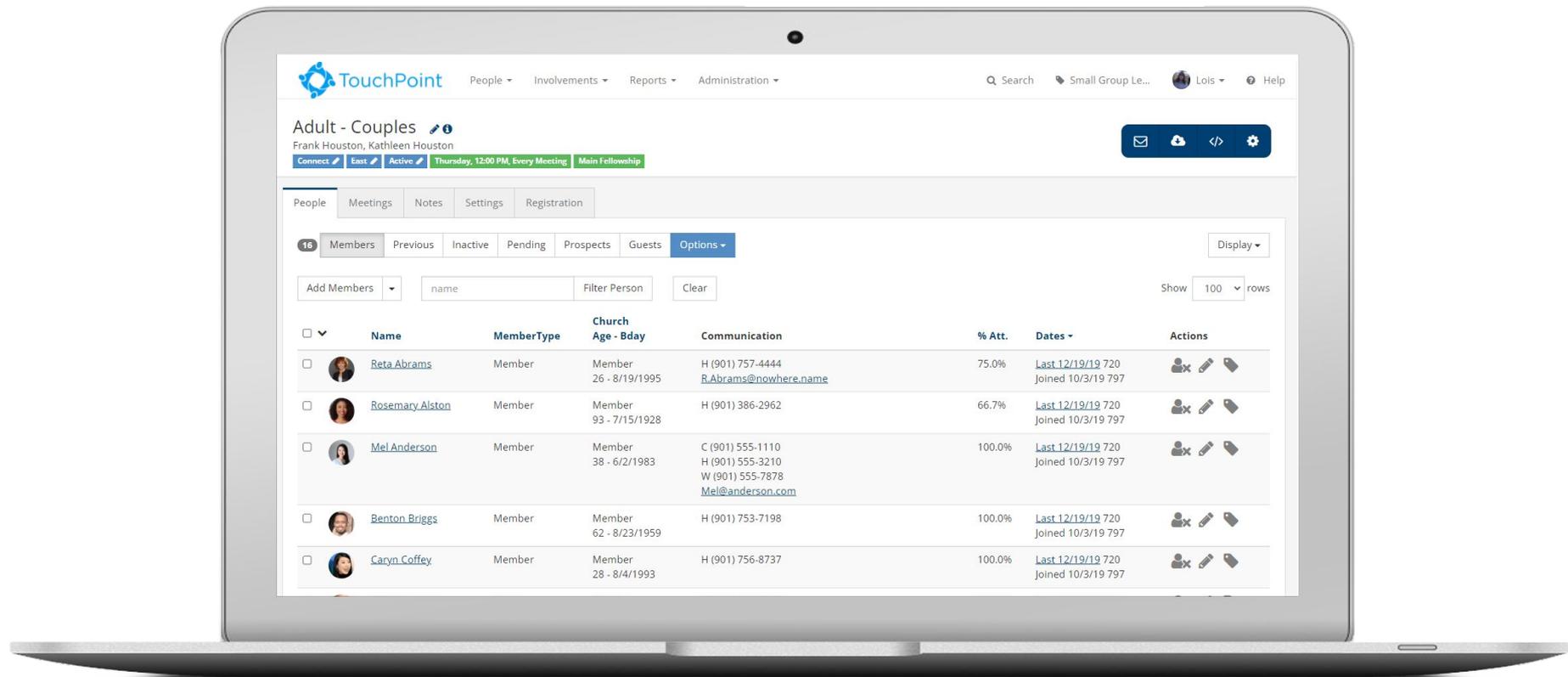
The William Horvath Family
Cheryl Horvath and Mel Anderson are sisters. ✎

Family Photo ⊕

Employment / School



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

TouchPoint People ▾ Involvements ▾ Reports ▾ Administration ▾

Q Search UnNamed Lois Help

People Search

Name / ID# **Email / Phone** **Address** **Date of Birth** **Campus**

Member Status **Gender** **Marital Status** **Status Flags** **Record Type** **Record Status**

Total Count **13**

Show **200** rows

Name	Status/Age - DOB	Address	Communication	Fellowship Leader	Tag
Courtney Abraham	Member 32 - 9/19/1989	7494 Willey Rd Germantown, TN 38128-2818	C (901) 642-8067 H (901) 258-2573 Courtney@nowhere.name	Terry Ziegler	🏷️
Theresa Adams	Member 22 - 12/14/1998	2679 E Barbara Cir Apt 6 Memphis, TN 38128-6093	C (901) 235-4427 *H (901) 253-7084	Khayla Packer	🏷️



Involvements Audit

✓ Status (Active versus Inactive)

✓ Programs & Divisions

✓ Involvement Type





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 **Est.** **Member** **Connected**



Personal **Involvement** Profile Touchpoints Giving Communications Resources System

Current Previous Pending Attendance Registrations Volunteer

🔄 Refresh

Show 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.com

👤 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

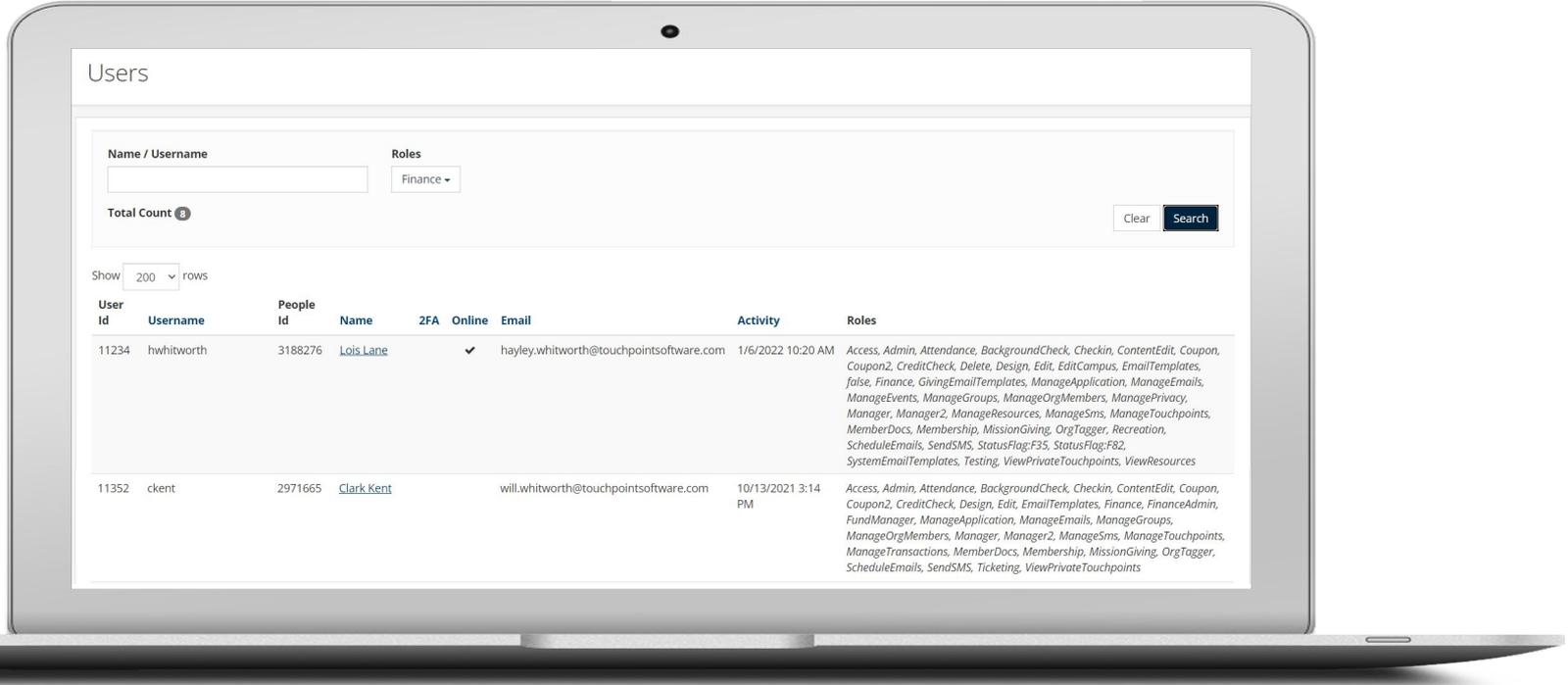


Extra Values Audit

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



User Roles Audit



User Role Settings Update

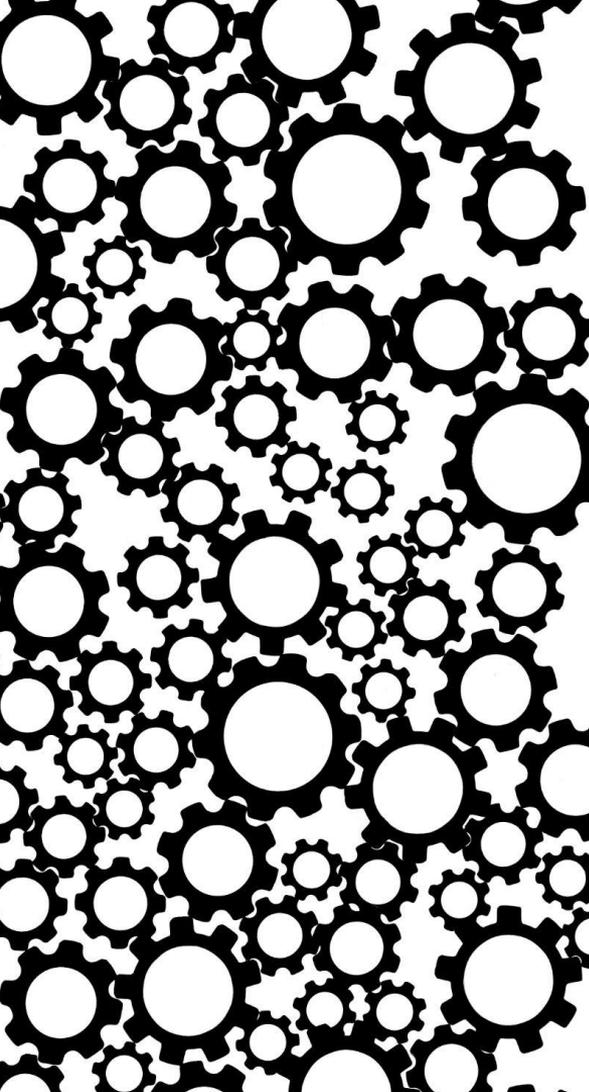
 Admin Mail

 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!