Building Power & Your List: Top 5 Data Recommendations

Data is just one part of your program and your daily work, so how can you make sure your data is organized and easily accessible? This document will provide some easy steps you can take right now to improve your data and better inform your program. Even if you don't think of yourself as a "data" person, but you gather sign-in lists, manage volunteers, send emails, or really communicate with members in any way, you can still easily implement these steps. We present simple changes that can help inform program.

Data matters because improving your data directly contributes to your ability to build power. You want to engage your members where they are and you want to win policy change to make life better for your members. Data helps you make strategic decisions for political wins. Having as much data as possible accessible in one place and standardized across systems means you have more information on each person you're trying to contact. And ultimately, creating good data systems saves time and money.

Data Top 5

1. **Disaggregated data collection** Collecting and organizing your data in clean formats can save you time searching and organizing your lists, regardless of what technology you use. Separating fields such as first and last name, emails and phone numbers as separate data points will ensure that your lists are easily searchable. The sign-in sheet template, found in the member engagement guide, is a great example of disaggregated data. Each category of data is its own column and does not allow for confusion from multiple entries.

Sample Sign In Sheet

First Name	Last Name	Email	Address	Zip	Phone	Cell or Landline	Initial to opt-in to texts	Year of Birth
Jane	Doe	jdoe@gmail.com	815 16th St NW	20005	555-123-4567	cell	*JD*	1980

2. **Capture data right away** The first interaction you have with a member or supporter may be the only opportunity to capture data, so make sure you are asking for vital data right away. It is almost always more difficult to go back and collect additional data later, such as cell phone numbers or email addresses. You should prioritize information that allows you to run your program. For example, if you are running a large text program, prioritizing collecting their mobile number and the permission to text them. Samples of minimum data points for different modes of contact can also be found in the SIP member engagement guide.

3. **Make a plan to enter data** Your opportunity to fully engage with new supporters or members may be short, so having data entered with a follow up process is vital. Having a plan alleviates the bottleneck of data entry: who will enter data after it is collected? When will it be entered? What is the follow up for those sign ups? This is also true for data collected via online modes: how are new sign ups being added to your primary database and what follow up are they receiving? Data is driven by your program plan and we recommend utilizing the Member Engagement Guide for additional guidance in these decisions.

4. **Create a simple data architecture** If your data is just a list of names and emails, you may be missing opportunities. Creating a standard set of "tags" or "codes" for supporters can help you quickly tap into your membership. For example, if you need people to show up to a last minute hearing at the Capitol, people who are tagged as "event attendee" may be the most likely to show up again. Without that tag, you would be unlikely to utilize your list as effectively.

   Additionally, if you have data being combined from multiple sources (text message program, email platform, excel documents) a data architecture can help establish basic rules to keep data organized. Do your text message lists get automatically updated as people on the email list sign up for them? Or is there a process that needs to be in place to update it? Data architecture simply ensures that people are not being lost in the cracks.

   If you have an old data setup (or none at all) sometimes it's best to "rip the bandaid off." You can start implementing these better structures right away, so that your data going forward will be stronger. With time, you can fix the old data or correct errors.

5. **Make a "data dictionary"** In an example above we mentioned a tag "event attendee," but how do you know what that really means? What if there are other codes that sound similar? Or codes that no one understands anymore? A data dictionary is a simple way of creating and maintaining definitions so that you do not duplicate or lose work, simply because you have forgotten. A dictionary can be simply an excel document that lists each field of data with a plain english description.

Utilizing a CRM

We can not emphasize enough the importance of using a CRM (Customer Relationship Management) software, as opposed to an Excel or google sheet solution. A CRM is any database, usually accessible via a website, that contains lists, tags and reports. Most CRM's impose many of the tips we mention above, such as disaggregated data and data architecture.

They also allow you to utilize more complex data such as voter files, modeled scores and dynamic fields. In other words, it helps you to easily create reports and lists and to help inform your strategy and tactics as you grow.

The built-in tools in many CRMs allow staff or volunteers to access the data quickly and easily, alleviating the bottlenecks that can occur in a localized solution where only one person can access a list at a time. Some CRMs also offer tools that allow you to interact with membership with minimal effort (e.g. an automatic welcome email for all new sign ups.)

What are my CRM options?

There are a multitude of option for CRMs and different ones serve different purposes. Some common CRMs include: Constant Contact, Salsa, Salesforce, Action Network, as well as more being developed all the time. Some focus on particular streams of communication such as email vs physical mail. Some serve distinctive purposes like fundraising. Yet others still offer a variety of "features" or integrations with other technology like SMS platforms and apps.

When choosing a CRM, talk to similar organizations with similar strategic goals: what are the tools they use the most and the least? What do they wish they had? How user friendly are the tools they use? Vendors will try to sell you their newest products, but the basics of data management and structures are more important than any one feature. Having a grasp of what you really need from your CRM can help you identify which one is best for your needs.

The most commonly used CRM in the progressive space is the Voter Activation Network (VAN). VAN is powerful, because it allows you to connect your membership data to voter file data, has a built in data architecture, can create tags and reports, and may connect to other tools you already use, such as texting or email platforms. In other words, it makes many of the steps laid out above far, far easier. VAN also offers a new system known as EveryAction which includes email and website building technology and more easily connects to your fundraising data.

Interested in technical assistance on how to execute these steps and more? Contact your state coordinator or Meredith Kormes at the National Institute for Reproductive Health for more information on how to get connected to the Analyst Institute.