Master Data Management for Nonprofits

CRAFTSMAN TECHNOLOGY GROUP, LLC

Executive Summary

Master Data Management, or MDM, is a way to effectively organize data at your organization. If done well, MDM brings together disparate systems and presents a unified view of constituents. MDM can provide operational efficiencies that will lower bottom-line costs and elevate fundraising and engagement in your programs. Master Data Management holds enormous promise and potential for your organization.

This White Paper will introduce Master Data Management for nonprofits. We will describe MDM as a strategy and explain why it matters. We will introduce the core concepts that are the building blocks of a successful MDM strategy. Finally, we will describe a path for implementing MDM at your organization. Along the way, we will provide examples specific to the nonprofit sector and point out challenges nonprofits are likely to encounter.

Before proceeding, it is important to note that this is a complex subject. This paper does not provide a single solution that will fit all organizations. Rather, it is our effort to describe Master Data Management in a nonprofit context, highlight its value and provide the building blocks for implementation. Our hope is that every reader will take away at least a few new insights that are immediately applicable. Your organization might even be emboldened to create a comprehensive Master Data Management strategy for the sake of its aspirations and despite its challenges.

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I. INTRODUCTION

Master Data Management (MDM) is a big idea – a transformative force for many organizations. MDM can improve fundraising, increase engagement and enhance programmatic outcomes. It can both reduce the bottom line and elevate revenue. It can transform aspirations – such as "the 360-degree constituent view;" solid metric-based decision-making; compelling customer service; and robust cross-channel marketing – into your daily reality. Perhaps most exciting, it is now more available than ever through more cost-friendly tools and technology.

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WHY IS MDM IMPORTANT?

Before we describe how MDM can do these things, we should first describe what it is. Formally, the term "Master Data Management" is used to describe a global strategy for standardizing data that emphasizes the construction of a single "source of truth" for each data element (aka the "Master Record"). Informally, the term may be used to describe data standardization and integrity assurance measures that do not create a distinct "Master Record." It might also be used to describe a specific tool or technology that provides data standardization. MDM is all these things: a global strategy, a series of standardization and integrity processes, and the tools and technology that help execute strategies and enforce standards.

MDM is important for nonprofits today because constituent data is no longer stored in one database. To collect valuable constituent information organizations

use direct marketing and fundraising databases; program management applications; constituent engagement tools such as websites, email marketing tools, and social media outlets; event management applications; and myriad custom Access databases and Excel spreadsheets. Often each application stores and manages data independently, even when that information is about the same constituent. Each of these applications and tools may be necessary to serve the unique functionality needed by a program, marketing campaign or engagement effort. To understand your constituents and communicate with them effectively, however, the data managed by those distinct applications must come together in a meaningful way. Only when the data are organized can you have a holistic view of each constituent and his or her engagement with your organization.

MDM ensures that a multi-application environment can not only hold together, but provide unique insights that make each of the individual parts stronger. An effective and fully implemented MDM strategy will:

- *Improve fundraising response rates by providing unique insights about donor behavior across channels.* A unified donor record can reveal the most effective channels or multichannel approaches and ensure the highest levels of engagement (through the strategic use of email to increase direct mail results, for example).

- *Reduce costs-per-dollar-raised by eliminating waste or inefficiency.* Effective data management will properly flag and reduce duplicates and globally share important information (e.g. important information, such as constituent death, or changes in marital status or address).

- *Deliver improved services to constituents by offering complete constituent insights.* Service delivery is enhanced when customer service and outreach efforts are meaningfully unified.

- *Help target communication effectively.* Multiple channels operating independently create fragmented

MDM Value

1. Improved response rates
2. Reduced fundraising overhead costs
3. Enhanced service delivery of programs
4. Better targeted communications
5. Reduced data management overhead

communication. Unified and coordinated strategies deliver a consistent and coherent message that compel high levels of engagement.

- *Reduce data management overhead by uniting process and technology.* Current MDM tools allow for automation and integrity processes that reduce the amount of manual auditing of records required to maintain a healthy dataset.

In this White Paper, we hope to demonstrate the potential for MDM at your organization and start you on your journey. Nothing can replace a great mission, effective organization strategy, dedicated staff and the right tools and technology. We see MDM as necessary for an organization to thrive. MDM brings all of those assets together and can help your organization achieve its goals.

Multi- Application CRM

Today's CRM Environment is typically a complex web of connected applications. Every system plays a critical role individually while also potentially providing invaluable organization-wide metrics.

In the adjacent image, each system passes a subset of data into a central hub (C) for sharing across the architecture. A General Ledger (G) provides Finance and Accounting functionality with data inputs from fundraising systems. Multiple, best-of -breed applications provide marketing (M) channels such as email, social or community portal access. Program (P) applications facilitate volunteerism and service delivery. Vendor (V) systems record gifts entered, segment files, stage prospects or otherwise augment data. And, many integrations are bidirectional, passing data back and forth in some regular way.
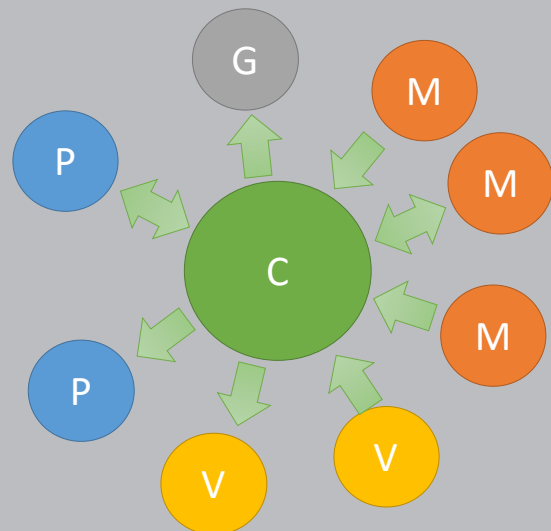
A well-executed MDM strategy facilitates data exchanges without losing any of the solution-specific information stored within the origin systems.

Graphic 1.1 Multi-Application CRM

II. MDM as Strategy

First and foremost, MDM is a strategy. Like all strategies, its purpose is to help realize an overarching set of goals and objectives. It must operate in a manner compliant with your organization's policies and practices. Its execution will be overseen and governed by organization leadership and realized day-to-day in the form of business processes that leverage tools and technology. In this section, we explore how MDM functions to address the challenges of managing data at a modern, complex nonprofit.

Components of Strategy

1. Goals & Objectives
2. Policies & Guidelines
3. Governance & Oversight
4. Standards & Processes
5. Tools & Technology

Goals & Objectives

Every nonprofit is unique, with a specific mission and set of organizational goals and objectives. The sole purpose of collecting, managing and disbursing information at a nonprofit is to better meet those goals and objectives. Similarly, the sole purpose of Master Data Management is to help you meet your organizational goals.

The first step in using Master Data Management as a strategy to meet your organizational goals is identifying which goals and objectives MDM will help you meet. Once those goals and objectives are clearly identified, they can provide a consistent way to measure the effectiveness of your MDM strategy. Establishing concrete objectives for Master Data Management early in an MDM implementation, and consistently referring to those objectives throughout the project, increases the understanding of MDM across your organization, the

buy-in of key stakeholders, and the value of MDM to your nonprofit.

While every nonprofit is unique, when we discuss Master Data Management with organizations we generally hear a set of familiar pain points around operational efficiency, cross-channel communications and metric-based decision-making. Underlying these pain points is the reality that systems, processes and analytics are not unified. Nonprofits have operational inefficiencies, are too-often single-channel in our fundraising or communication efforts. Nonprofits sense that there are blind spots in understanding constituents, and how to best serve clients. Nonprofits also recognize that they have missed opportunities or fallen short of the highest level of engagement among constituents.

A Master Data Management strategy can alleviate organizational pain by helping nonprofits meet their objectives of increased efficiency, coordinated communications and well-informed reporting. Ultimately, these objectives all support the larger goal of increasing the level of engagement in the mission of your organization. MDM can be a unifying force, the "connective thread" in a web of applications and integrations that will allow you to realize larger organizational goals.

POLICIES & GUIDELINES

Nonprofits operate within a framework of compliance. In other words, there are forces both internal and external to the organization that guide its behavior. Many of these forces are unique to the nonprofit sector. Some are legal requirements while others might be self-imposed standards. The sum of these forces – the framework of compliance – is important to understand as you organize, leverage and otherwise manage data.

At one end of the framework is legal compliance. Organizations must follow specific laws when handling certain types of data. For example, HIPAA governs the use of personally identifiable health data and COPPA

governs the use of data gathered from minors. IRS rulings govern our fundraising practices. Legal compliance is a critical obligation that should always be considered when developing a Master Data Management strategy.

Nonprofits also have internal policies and guidelines we must adhere to. These include auditing practices required by the finance department, privacy policies developed by the fundraising team, or security policies created by IT. Internal policies might also regulate how your organization shares data with vendors and be established in the form of fair-use data sharing agreements and nondisclosure statements. It is as critical to understand and follow these internally generated policies and guidelines as it is to ensure compliance with other legal requirements.

Organizations also have stated norms or behavior for managing data that are not set forth in specific policies. These include how data is shared across departments, such as when the major gift team accesses information about a donor's volunteer activities, or when the leadership team obscures client information in case studies. Without uncovering and codifying these cultural norms, organizations can unknowingly implement MDM rules that are at odds with the common workplace culture, with the result that they are either ignored or undermined by staff. A successful Master Data Management implementation uncovers these organizational assumptions, negotiates them among all parties, and incorporates them into the MDM strategy.

There are also expectations about managing data that our constituents place on us. Occasionally we will see organizations attempt to articulate these in the form of public-facing documents such as a Donor Bill of Rights, or Client Bill of Rights. Often, these expectations are uncovered only when we fail to meet them. For example, organizations will determine an appropriate level of constituent email communication only after a donor has complained about being listed in an annual report. However your organization assesses constituent expectations, they are important to consider when developing your MDM strategy.

STANDARDS & BUSINESS PROCESSES

Most of us do not think about strategy any more than we think about policy on a day-to-day basis. Instead we pay the most attention to the specific standards and business processes that tell us how to do our work. Standards and business practices form the "real world" component of your MDM strategy. They teach your staff exactly what to do to live your MDM strategy in their actual jobs. For example, without a specific standard to refer to, your volunteer coordinator might not know that he or she shouldn't disclose information about patient visits to an inquiring board member.

Without specific business processes, your database manager might not exclude donors who have opted out of receiving direct mail when he or she exports lists for your direct mail vendor. Simply put, if your MDM strategy is not articulated in the specific standards and business processes that govern every day behavior at your organization, it will not serve your organization.
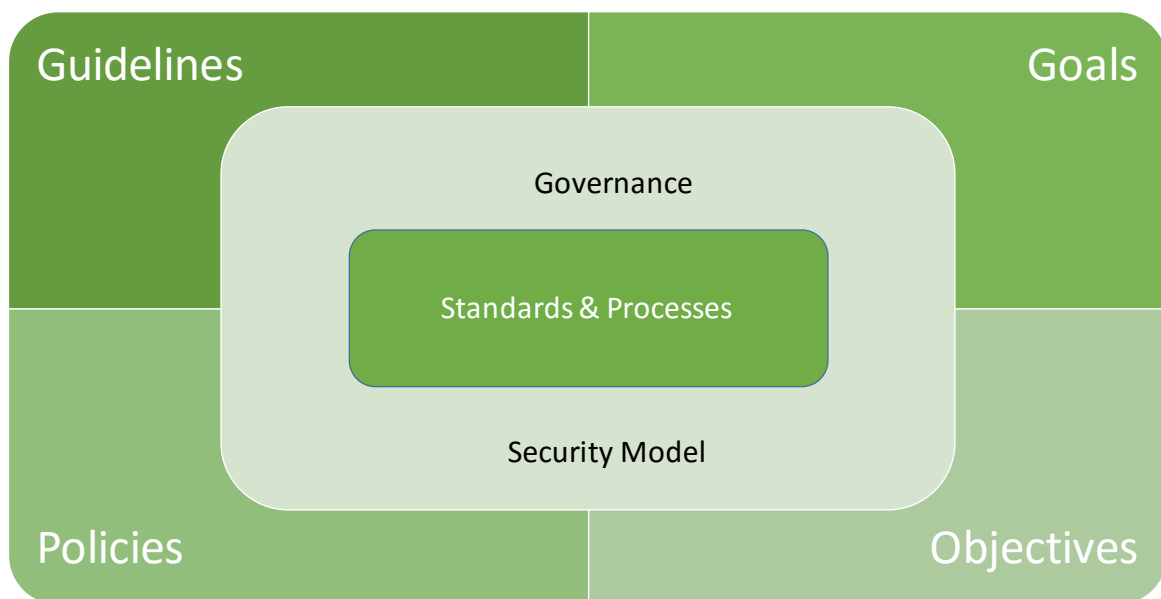
Graphic 2.1 MDM as Strategy

Governance & Oversight

Any change at your organization has the potential to impact MDM. A new Executive Director may have a vision for effective communication that needs to be codified into goals and objectives and realized through MDM. New programs may come with new sets of legal requirements related to the data collected. If a new technology is implemented, it may dramatically decrease the overall quality of data, requiring new MDM business processes to ensure that your data standards are met

The purpose of governance is to create a mechanism to handle changes. An effective governance model is one that is driven by goals and objectives, operates within rules and guidelines, and can effectively oversee and implement standards and practices at your organization. Governance, broadly speaking, is what keeps MDM effective over time.

Tools & Technology

The systems, connections between them, and means for bridging the gaps are of critical importance to realizing the benefits of an MDM strategy. This is especially true in today's CRM environments where multiple applications provide multiple touch-points for constituents, as well as multiple opportunities for data management conflicts. The good news is that just as evolutions in technology have made data more dispersed, those same evolutions provide the means to unify data across platforms. These tools include advanced configuration options to standardize data, utilities that will integrate data across databases, and even applications dedicated to performing the hard work of Master Data Management.

Before diving into specific technological solutions, though, it is important to have your MDM strategy thoroughly documented, otherwise you will not know how to use the tools you choose. If you understand and have articulated your goals for MDM, you will be able to judge which tools will best help you meet those goals, and implement them effectively.

Scope of Technology
1. Applications
2. Databases
3. Integrations

SECTION RECAP

MDM is not simply about technology. It is a strategy to realize the larger goals of an organization.

By looking at relevant goals and objectives we can elevate the conversation from "What application should we use?" to "How can we increase fundraising, operational efficiency and better deliver client service?" By documenting the compliance framework for your organization, including external and internal policies and guidelines, we can use MDM to ensure it is adhered to. By considering your standards and practices, we can begin to understand how MDM will be lived at your organization. Through proper governance you can ensure staff ownership and effective management from implementation onward.

DATA IS PEOPLE

For those of us accustomed to large-scale data management, it can be easy to forget what data actually represent: people. An address is not just a formatted block of fields: it is someone's home, their largest investment, where they are raising their families, and experiencing life's joys and tragedies. Every time we communicate, we are effectively walking up to their door and asking for a few minutes of their precious time. We owe it to them to be respectful of that time, be compelling in our communication and honor any conditions they might place on us.

A nonprofit's ability to manage data at volume is only as useful as when each person feels like an individual — not just a composite of fields and tables moving through our systems. When implementing an MDM strategy, we recommend framing these discussions in human terms. "What has Bill's experience been?" "What is Jane telling us about how she wants to be a part of our mission?" "How could we have retained Rodrigo?" Personalization thereby becomes more than merge fields on a fundraising appeal. It becomes a genuine effort to appreciate and understand those individuals at the center of your organization's mission.

III. Core Concepts

We want to introduce a few core concepts that will help you in the work ahead. First, we will explain the differences between standardizing and validating data. Second, we will outline your options for reducing bad data through prevention, correction or auditing. Third, we will discuss deduplication and the process for identifying and merging matching records: normalizing, matching and mastering. Finally, we will consider supplemental verification or augmentation services.

Core Concepts
1. Formatting and standardization
2. Prevention, correction and auditing
3. Deduplication, normalization, matching and mastering
4. Verification and augmentation

Formatting and Standardization

When most people think about reducing bad data, they think about making sure that all the values in a field look the same and are being used in the same way. For example, force or all phone numbers to follow the (xxx) xxx-xxxx format, or limit the values in a Status field to "Open," "In Progress" and "Closed." Master Data Management includes this type of work, but with today's complex systems there is more to it than that.

While formatting and standardization sound simple, looking across your organization's architecture you will see a wide range of entry points. These are likely to include online forms (e.g. donations, intake), volume processing of gifts, and programmatic tools (event registration applications, volunteer management, etc.). Each entry point has its own unique approach to

gathering information and checking data integrity. This makes it likely you will encounter significant issues in bringing all that data together. Having a Master Data Management strategy means you can articulate the standards and business practices for each data source that are required to meet your organizational goals. These standards and business practices are likely to include one or more of the following techniques.

PREVENT, CORRECT AND AUDIT

In the mission to reduce data inaccuracies, the first line of defense is prevention. Where possible, we try to prevent data entry errors by using proactive controls. These appear in the user interface (UI) and require the data to meet certain standards before a record can be saved. If the data does not meet the required standards, the record cannot be saved, preventing bad data from entering your system. Proactive controls could include approaches such as requiring data in specific fields, or creating fields as picklists so that only specifically allowed values can be used. A more robust control might apply conditional logic within the UI that requires certain fields or field values be present on the record when other fields or field values have been entered by the user. When data is being entered through the UI, the user would receive a warning that directs him or her to the data that is inaccurate. Once the bad data is fixed, the record will be saved. When data is being entered in a batch process, an exception file should be generated of all the records that could not be processed. The records in the exception file should be corrected and the file re-imported.

A second line of defense is automated correction. In this case, instead of stopping records with bad data from being saved, the bad data is automatically corrected during the save process. Corrections take place behind the scenes, without any user intervention. The challenge to using internal correction is that each variation must be anticipated so that rules may be designed that effectively and automatically correct errors. In other words, there

INTERVENTION APPROACHES

1. Prevent
2. Correct
3. Audit

can be no variables or complexities that require user interpretation to identify the bad data and change it. Because of this restriction, correction is most often used in cases where a specific value should be added to a record based on another specific value already present on the record. For example, correction could be used to add the title of "Mr." whenever a record is saved with a gender of "male." As you can see, the use case is very limited. For example, correction can't be used to add the correct title if the gender is not entered, because the application cannot consistently evaluate gender (and hence title) based on a name. Similarly, if the title should be something other than "Mr." (such as "Dr.," "Rev.," "Captain"), there is no way for the application to consistently choose the right one: user interpretation is necessary.

This brings us to a third line of defense: audit. Audit automatically flags instances where bad data might have been entered. Unlike prevent and correct, audit happens *after* the bad data has been entered and saved to the database. This means that the bad data is viewable and accessible by users between the time it is entered and the time it is audited and corrected. Audit can be done through standard reporting functionality or by a third-party application. As with bulk correction, the audit process produces a list of suspect records. A user reviews those suspect records and then makes any changes necessary. Time spent on audit can be burdensome but it is often necessary to balance the needs of quick entry with accurate data.

Table 3.1 maps intervention efforts and outcomes and notes where they are likely to be applied (in the user interface during integration or within the database).

Intervention	UI	Integration		Result
Prevent (before)	error message thrown (must correct before saving record)	error file or error table (must correct before adding records)	→	Data not there, Error not there, Blocked until user resolves
Auto-Correct (during)	no user intervention (corrected automatically) - no evaluation prior to change	no user intervention (corrected automatically) - no evaluation prior to change	→	Data there, Error not there, Rules choose resolution
Audit (after)	bad data stored, but reviewed and changed by user after save - user intervention required later	bad data stored, but reviewed and changed by user after save - user intervention required later	→	Data there, Error there, User chooses resolution

Table 3.1 Approaches and Results

DEDUPLICATION

The other issue that almost always comes up in discussions of data management is the problem of duplicate records. Duplicates can occur within a single data source or across multiple data sources. A duplicate record can be created from something as simple as an abbreviated address or a misspelled name – anything that would prevent a record from being found in an initial search — leading a user to enter the data as a new record (thus creating the duplicate).

While duplicates are easy for us to identify as human thinkers, they are surprisingly difficult to identify using machine logic. The proliferation of non-standard abbreviations ("Street" "St." "St" "ST"), nicknames ("Robert" "Bob"), address formats ("221B Baker St." "221 B Baker St." "221#B Baker St."), and general user errors, makes even basic biographical information surprisingly diverse.

The more diverse the data, the harder it is to identify truly duplicate records using one set of logical rules. Even to identify "St." "Street" and "ST" as "Street" for the purposes of identifying possible duplicate records, we would need to differentiate those series of letters from those found in "St. Louis" "67 Streeter Avenue" and "123 STRONG AVENUE."

In multi-app environments, critical information needed to identify duplicates in the main database may reside in a peripheral system while only a subset of information travels to the main database. Your deduplication strategy needs to consider not only your primary database, but any other databases, integrations or file transfers that provide information to, or receive information from, that primary database.
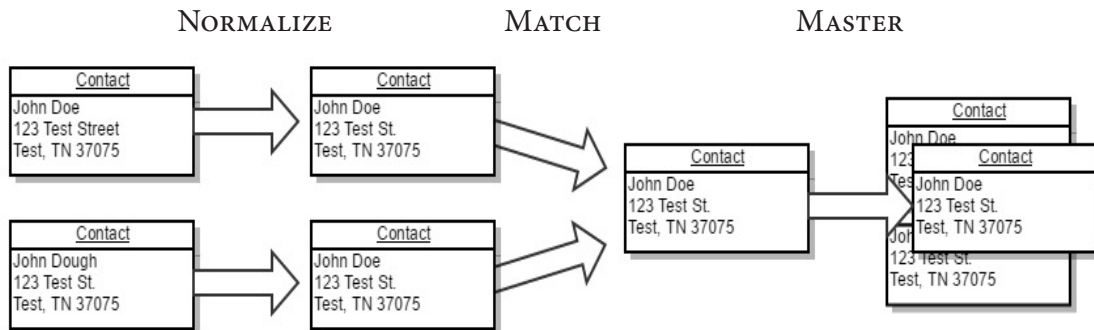
SUB-PROCESSES OF DEDUPLICATION

1. Normalize
2. Match
3. Master

It is helpful to understand three additional sub-processes of deduplication in your Master Data Management strategy: normalize, match and master. Normalize standardizes fields within records. Match identifies duplicate records. Master identifies or creates a main, or "master," record."

Graphic 3.2 Normalize, Match, Master

Verification & Augmentation

When create a Master Data Management plan or building a Master Data Management framework, we often encounter some confusion between data standardization and data verification. Data standardization ensures that the contents of a field look and act the same across records (for example, "221B Baker St."). While data standardization enforces internal consistency within the database itself, it cannot verify "221B Baker St." exists in the real world.

The need to verify field values usually arises in the context of biographical contact data: contact data: street addresses, email addresses, and phone numbers. For most organizations, a perfectly formatted email address is useless if sending mail to it results in a hard bounce. Similarly, a perfectly formatted phone number is useless if the phone has been disconnected.

To meet the need to verify addresses, email and phone numbers, many companies offer paid services that will compare your data against an up-to-date listing of valid data stored on the vendor's database. In the case of address verification, this vendor's list of valid data might include all mailable addresses in the United States. Address verification can be done as a bulk process, after which a list of invalid addresses is returned to you for review, research, and correction or deletion. It can also

be done in near real-time by using an API to look up addresses on the remote server as they enter your database. In this case, the program can suggest valid addresses as the user enters data and/or prevent the user from entering an invalid address.

Other companies offer data augmentation services. In these services, the vendor will sell "missing" biographical data elements for your constituents. These might include email address or phone number. The new data has been verified by the vendor, and can be imported into your database.

While verification and augmentation happen outside of your internal systems, they can have a profound effect on your Master Data Management strategy. For example, if you are using verification a service as well as internal address standardization rules, you need to make sure the formatting of the verified address is compatible with your address standardization rules. Otherwise, it could be that when the verified address is chosen, it will not be able to be saved. Both verification and augmentation services need to be documented and considered when implementing MDM.

SECTION RECAP

Understanding the four core concepts of Master Data Management will help you build your strategy. Formatting and standardization make recognizing duplicates possible. Enforcing clean data through the techniques of prevent, correct and audit reduces costly errors. Deduplication, normalization, matching and mastering build a single strong and unified data set. Verification and augmentation services can assure that your data reflect physical reality.

IV. Implementing MDM

In order to fully capture how to implement MDM at your organization, we need to take into account your unique MDM strategy and overall system architecture. A successful implementation of Master Data Management at your organization fully accounts for your unique needs and overall system architecture. To achieve this, a thorough implementation approach includes five stages: Plan, Design, Build, Deploy, and Support and Monitor.

Stages of Implementation

1. Plan
2. Design
3. Build
4. Deploy
5. Support and Monitor

Plan

Defining and documenting your MDM strategy is the first step in your implementation effort. A comprehensive strategy will bring together larger organization goals and objectives, policies and guidelines, relevant standards and business processes, identified governance bodies, and tools and technology. Once your MDM strategy has been established, assess the system architecture and evaluate how well each element supports your strategy at that point. This assessment will be the primary input for the work ahead.

Design

During Design, you will develop the exact rules that will support your MDM strategy. These rules will be applied and enforced in your system architecture through business processes and technologies. This is the point at which you select new tools and technology, if you have not already done so.

BUILD

Build will implement specific business processes, tools and technology that will direct user behavior and enforce those rules. In this process, you will create prevention methods (such as validation rules), correction methods (such as workflows) and test methods (such as audit reports).

It's imperative to thoroughly test all new MDM measures during Build. Tests should include accuracy testing to ensure each is producing expected results, volume testing each measure to ensure the same results are achieved with a large number of records, and business process testing to ensure processes are streamlined and efficient for staff. It is particularly important to assess the staff time needed to run MDM once implemented. Your organization's tolerance for errors in your database may change as you gain understanding of the level of effort required by staff on mitigation.

DEPLOY

Once the MDM plan has been established and tested during Build, you are ready to Deploy. Deploy includes finishing any cleanup needed for the existing data, implementing the MDM business processes, training staff and distributing documentation, and activating MDM rules.

SUPPORT AND MONITOR

After your MDM strategy has "gone live," you begin Support and Monitor. This is the stage during which ongoing governance should be established. Ongoing governance maintains the usefulness of the MDM strategy by assigning knowledge-keepers, monitoring the effectiveness of then-current processes, and proactively examining the effects of changes in the overall environment on MDM.

Section Recap

Implementing MDM begins with setting strategy and assessing architecture. From there, you can design the rules and approaches that will best realize your strategy. Once MDM has been built and deployed, your implementation is supported and monitored to keep it accurate and useful in a changing organizational environment.

MDM in a Salesforce Environment

Most organizations have a CRM system of applications, rather than a single, discreet application as their CRM. This graphic demonstrates a common scenario in which some core business areas on the Salesforce platform, and others not.

This scenario presents a host of challenges for MDM. The organization would have multiple points of entry and multiple data models, but have expectations of a unified view of constituents and a unified experience.

Each point of entry into the system requires prevention measures that ensure the entering data is compatible with the existing data. Major integration points need correction procedures to make the data Salesforce-ready. Auditing processes are likely needed to resolve exceptions not readily caught and corrected or prevented to begin with.

Graphic 4.1 MDM with Salesforce

App Spotlight: Clear MDM

For organizations using the Salesforce platform, we often look to ClearMDM as a central tool in Rule Enforcement. Clear MDM provides data standardization and a robust tool for de-duplication efforts including normilzing, matching and mastering of records. For more information, please visit. http://www.clearmdm.com/

SUMMARY & CONCLUSIONS

Now more than ever, the success of a nonprofit is determined by how well it stewards the information collected from donors, clients, volunteers, members, public servants and prospects. Master Data Management allows you to get the most value out of your data, even when it is spread throughout your organization and across multiple databases. MDM is a critical strategic component to fulfilling your organization's mission.

By utilizing Master Data Management as a strategy you can meet your organizational goals and objectives, and create targeted rules and business processes that meet your specific needs. MDM rules and business processes are created within a framework of aspirations, regulations, assumptions and requirements. When understood strategically, MDM can help you weave together seemingly disparate goals and restrictions. The results of effective Master Data Management include increased fundraising, a reduction in the cost-per-dollar-raised, improved service delivery, targeted communications and efficient data management.

When implementing MDM at your organization, consider the possible remedies for bad data (prevention, correction and audting) .as well as the various methods of deduplication (normalization, matching and mastering. Finally, any MDM implementation should proceed through an orderly process of planning, designing, building, deploying and ongoing support.

We hope that this white paper has given you a sense of the advantages of strategic Master Data Management at your organization, as well as enough information for you to explore an MDM implementation.

Acknowledgements

Craftsman Technology Group wishes to extend our gratitude to the many organizations who have contributed directly and indirectly to the contents of this white paper.

Further Reading

The following discussions can be found at http://www.craftsmantech.com/blog

MDM: Enforcing the Rules
by Bran Scott

The key design element behind Master Data Management is the "master record." Master records are created for each shared data element across the organization. Master records are strictly controlled and managed, and all similar records throughout the organization are forced to refer to their master records as the source of truth when updating, formatting, adding, deleting or otherwise manipulating the data included on the master record.

MDM: Making the Rules
by Bran Scott

The central idea of Master Data Management is that in order to effectively reconcile key information across the organization, you must first define a "master record" for every shared data element. Master records are strictly controlled and managed. All similar records, regardless of which database or application they are related to, then refer to the master record as their source of truth modifying the record.

Quality: Not Just Good, It's Right
by BJ Cortis

Not only must the outcome be "good," but the means of achieving the outcome must comply with standards or regulations, achieve broader goals and objectives, and have been executed in a manner consistent with an organization's culture. In other words, "good" is only sufficient if also done "right."

Governance for Large Projects
by BJ Cortis

A hallmark of a well-run project is effective governance. For the purposes of this post, I would consider "governance" the authority structure outside the core project team that has been constituted in support of the project. This structure makes a project viable even though the impact on the organization may exceed the mandate placed on the project team.

Additional Resources

Craftsman Technology Group's blog provides a templates, case studies and best practices to support organizations tackling this and a range of other topics. For more information, visit: http://www.craftsmantech.com

About Craftsman Technology Group

Craftsman Technology Group is a professional services firm based in Boston. We work with nonprofit organizations of all sizes. Our mission is to ensure your project meets its goal and objectives.

Our Practice

We are a team of expert Project Managers, Analysts, Architects, and Developers. Collectively we have over 50 years of nonprofit project experience.

Our Services

1. Project Management We help start projects and often manage systems projects on our clients' behalf.
2. Tech & Data Services We provide data and analytic services and can help you pull together your systems architecture.
3. Application Services We deploy a core set of applications.

Craftsman Technology Group was created to support and deliver successful projects for nonprofit and higher education clients. The size and sophistication of the sector – and the expectations placed upon nonprofits by their constituents – has grown exponentially in recent years. Robust systems are needed to provide effective constituent engagement – to compete for fundraising dollars, to deliver multichannel communications and to execute programs.

Today, many organizations have developed sophisticated engagement strategies. However, few have the internal expertise to build the systems required to support these strategies. Application providers may offer tools and services but cannot ensure that your organization is ready to embrace the change internally or is fully prepared to manage the project required to realize the opportunity these tools might present.

As specialists in Constituent Relationship Management (CRM), Craftsman Technology Group is your project partner. Our expertise is in project management – and ensuring that your project realizes its objectives.

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