



Data strategy and cake

19 May 2021



@AdaptaforNFP

About Adapta

Adapta Consulting is an independent consultancy working exclusively with organisations in the not-for-profit sector.

We specialise in information systems where our consultants have helped a broad range of charities make the right choice and go on to a successful implementation. We are completely independent, which means that we evaluate all the options for change on their merits and we have no stake in any particular outcome.

What we do

Our services include expert assistance with:

- CRM
- Selecting software
- Strategies for IT, Digital & Data
- Developing a business case
- Managing information security
- Virtual IT Director
- Coaching and mentoring
- Improving your processes
- Managing implementations
- DPA and GDPR compliance

Further reading

Adapta Consulting guides and publications

Adapta Consulting's 'Adaptive Approaches' guides:

<http://www.adaptaconsulting.co.uk/adapta-guides>

Adapta Consulting's online 'Knowledge Resources':

<http://www.adaptaconsulting.co.uk/adapta-knowledge>

Contact us

We would love to have a further chat with you.

Give us a call on: 020 7250 4788

Or drop us an email: hello@adaptaconsulting.co.uk

Our speakers

Bo Ruan

Head of Data, Alzheimer's Society



Matt Jago

Controller of Business Systems & Integration, Sightsavers



Jo Fulford

Associate Consultant,
formerly Data Integrity
Specialist at the Advertising
Standards Authority



Keith Collins

Principal Consultant, Adapta
Consulting



David Membrey

Principal Consultant, Adapta
Consulting

Today's programme

- 14:00 **Arrival and welcome**
Keith Collins & David Membrey, Adapta Consulting
- 14:10 **Data management for non-profits – what's occurring**
A short overview of some of the trends and innovations in data management that are now being used by organisations large and small in the non-profit sector
- 14:20 **Case studies**
- Bo Ruan – Alzheimer's Society
 - Matt Jago – Sightsavers
- (short break)
- Jo Fulford – formerly Advertising Standards Authority
- 15:45 **Discussion & feedback**
Breakout discussions and feedback
- 16:40 **Review & Close**

Housekeeping – interruptions are possible

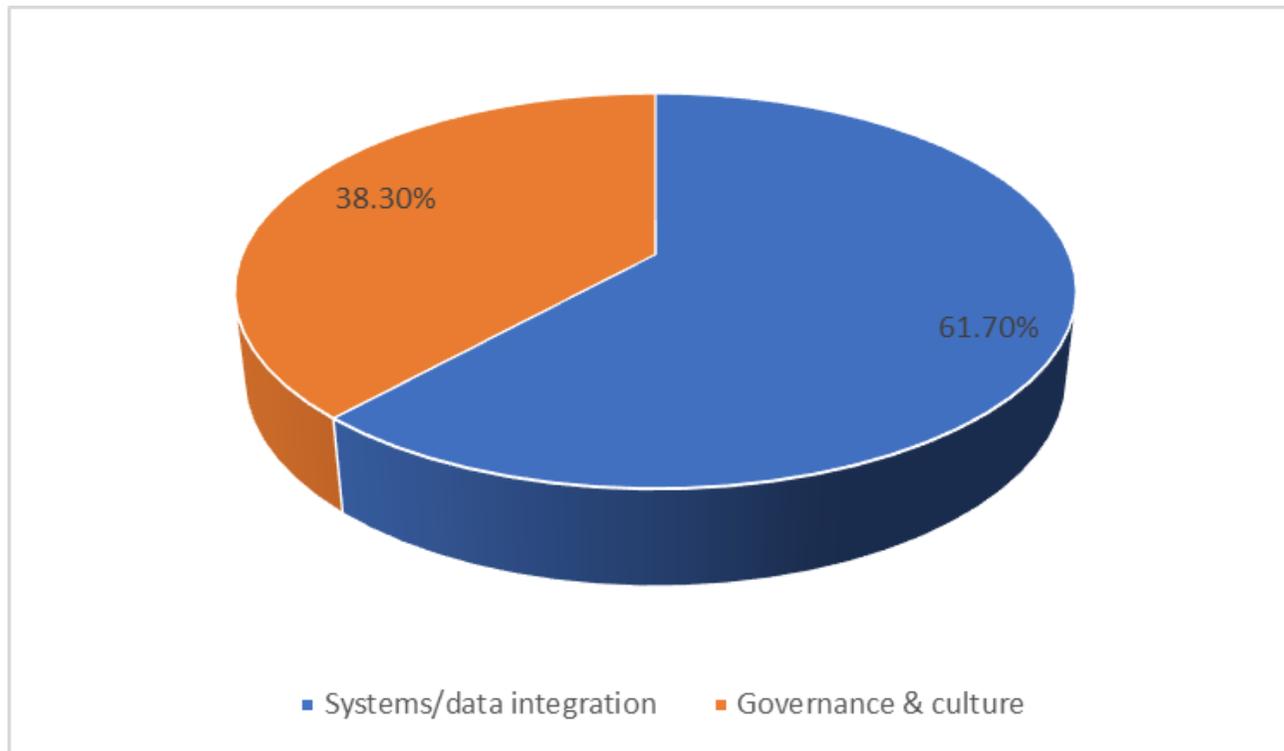


Rules of Engagement!

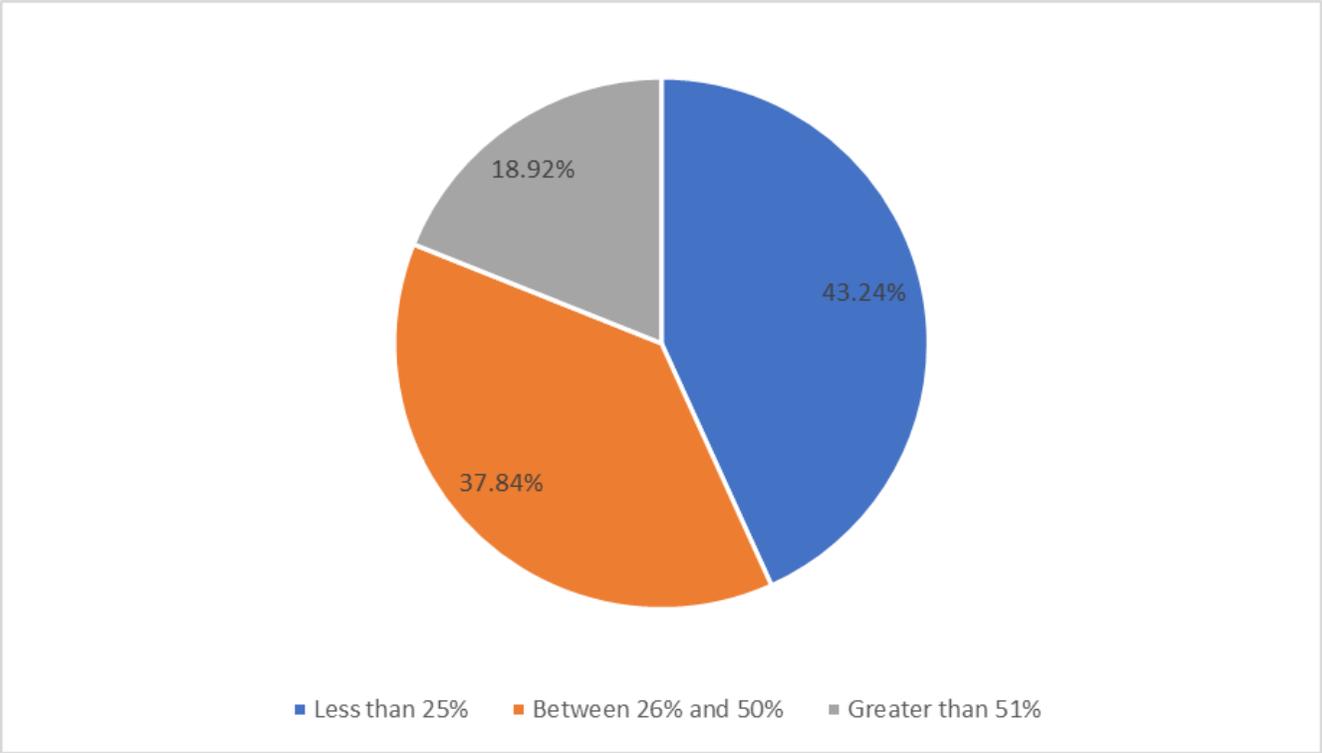
- 'Share screen' should only be used for speaker presentations.
- Please **remain in mute mode** unless you wish to participate in the Breakout Room discussions.
- Your profile name should be your name and organisation – Hover over your name in Participants and select Rename.
- **If you have a question relating to the speaker presentations, please submit these at any time using the Chat feature.** Questions will be picked up once each presentation has ended.
- If we do not have time to cover questions/all questions, we hope to open a private discussion space following this event.
- We'll be sharing the Adapta slides after the event.
- **If you have a technical question** please use the Chat facility, and select **Paul Stirrat**, who will be able to help.

Some questions we asked in advance...

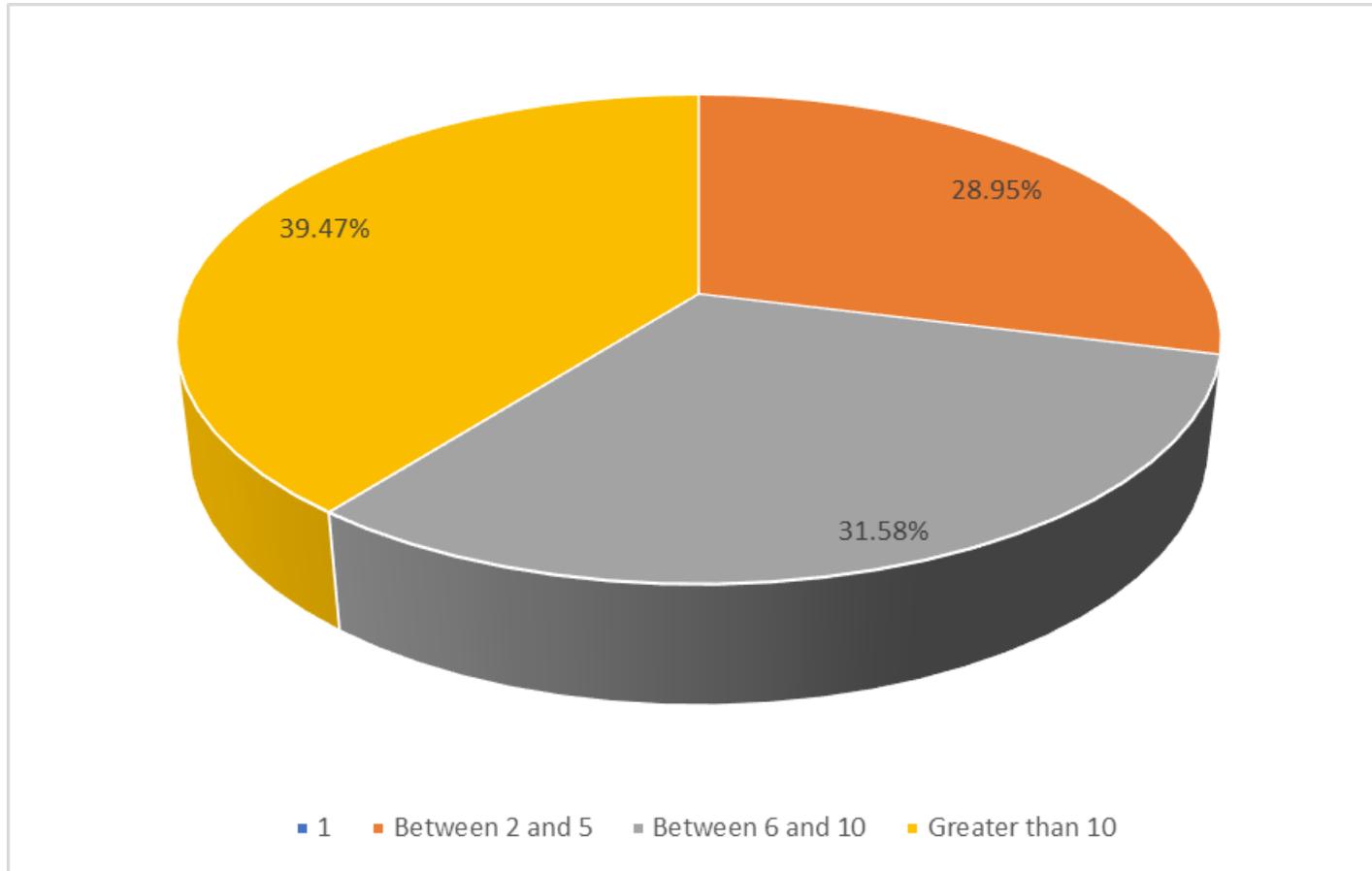
What is your biggest challenge with data?



How much of your stakeholder/supporter/member data would you estimate is created by the stakeholders themselves through digital channels?



How many difference sources of stakeholder/supporter/member data would you estimate that you have?



Data – lots and lots of data



“The world is already awash with data—and the ferocious pace of its creation shows no sign of slackening. IT market research firm IDC estimates the amount of data stored in 2020 at 59 zettabytes (that’s 59 followed by 21 zeros). It predicts that **the next three years of data creation will exceed that of the previous 30 years combined.**”

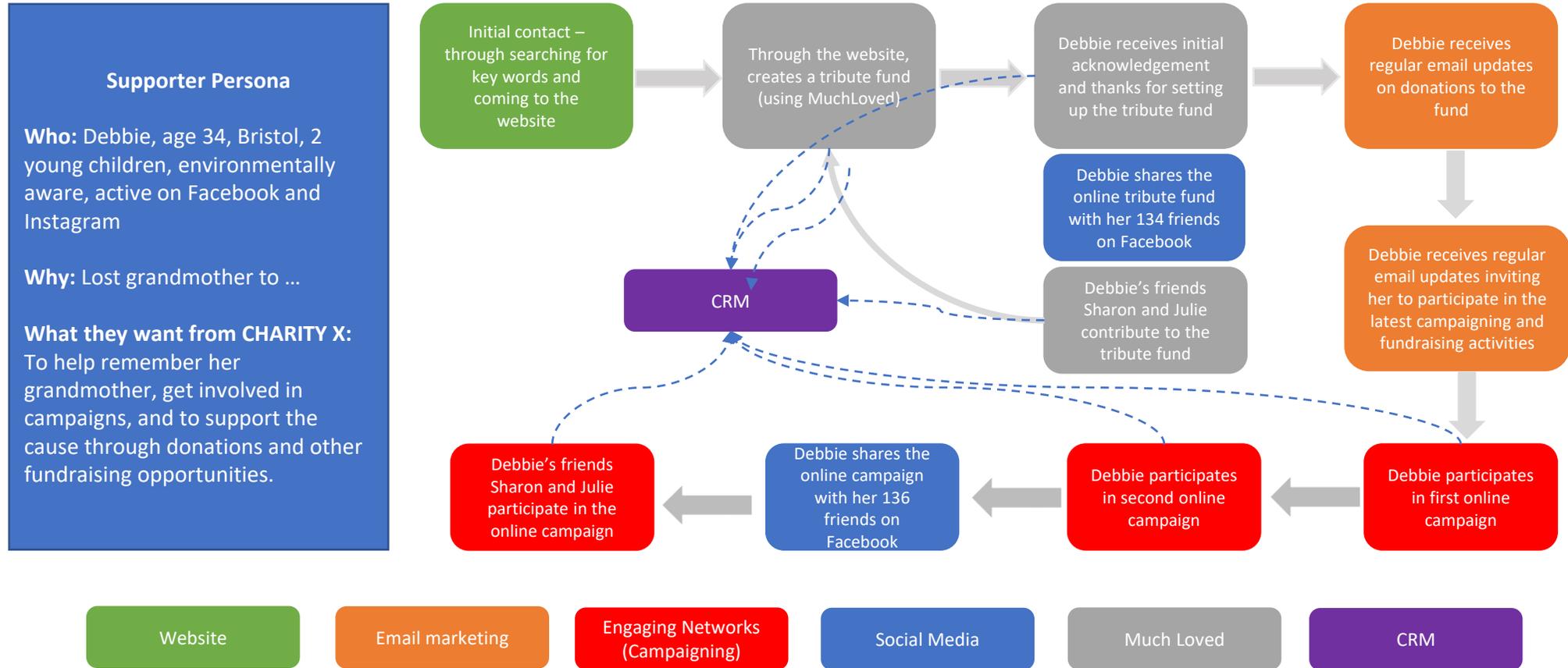
Data Evolution in the Cloud, the Lynchpin of Competitive Advantage.

Economist Intelligence Unit, May 2021



So where is
all this data
coming
from?

The modern supporter journey



Notes and observations: Only partial data on campaigning, tribute fund, email engagement and social engagement is **uploaded into CRM**, and where this does happen, it happens as a result of a **periodic import process**. In order to understand the depth of a supporters' involvement across each of these business areas **the data needs to be accessed in the different systems**, which **limits the ability to automate and personalise the supporter journey**. Some steps in the process require manual import/export processes to take place between systems to share data.

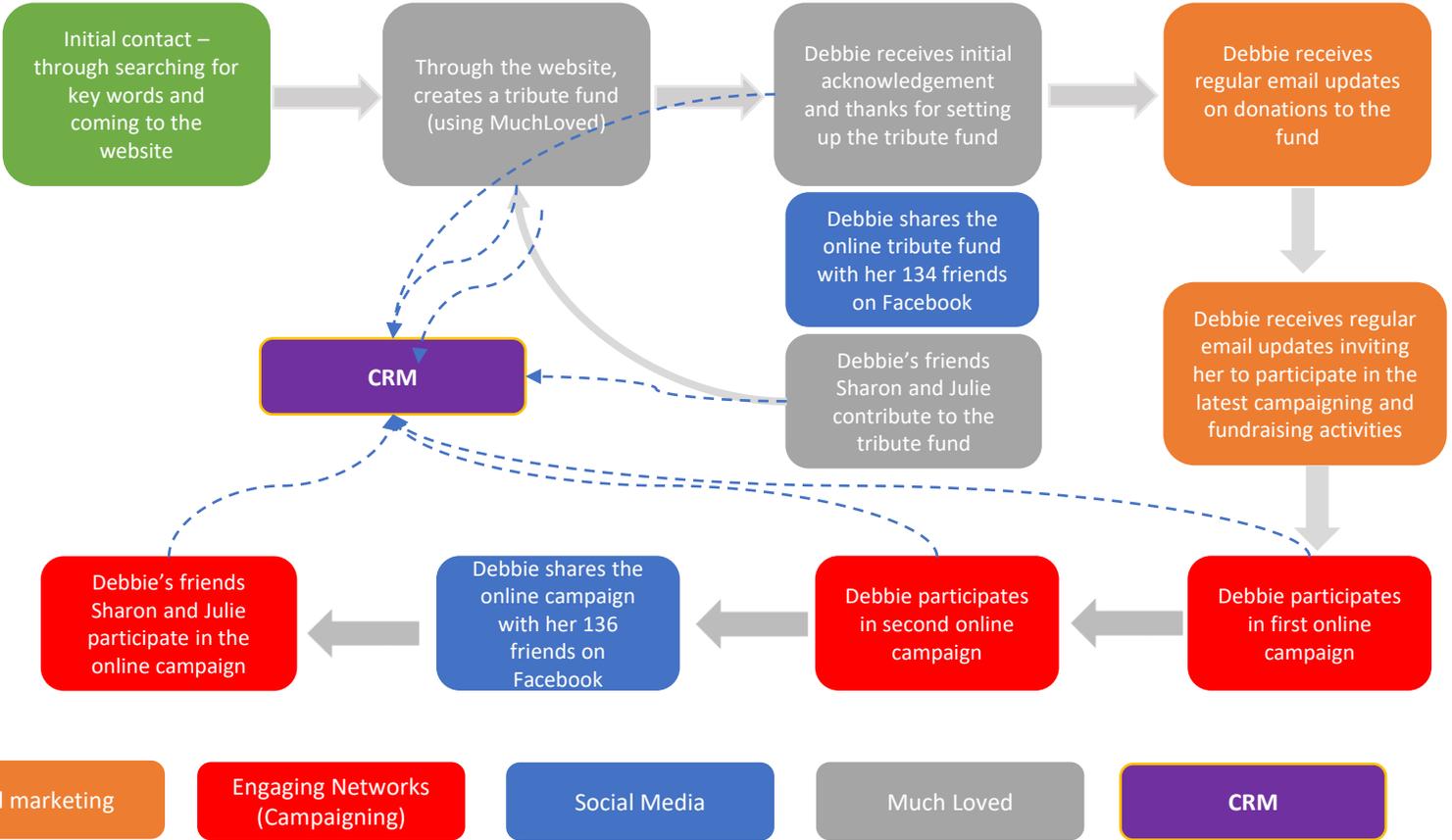
Data management goes *way beyond* CRM

Supporter Persona

Who: Debbie, age 34, Bristol, 2 young children, environmentally aware, active on Facebook and Instagram

Why: Lost grandmother to ...

What they want from CHARITY X: To help remember her grandmother, get involved in campaigns, and to support the cause through donations and other fundraising opportunities.



Notes and observations: Only partial data on campaigning, tribute fund, email engagement and social engagement is **uploaded into CRM**, and where this does happen, it happens as a result of a **periodic import process**. In order to understand the depth of a supporters' involvement across each of these business areas **the data needs to be accessed in the different systems**, which **limits the ability to automate and personalise the supporter journey**. Some steps in the process require manual import/export processes to take place between systems to share data.



**Increasingly data is generated – digitally -
by our supporters, campaigners,
volunteers and service users**

**What does this mean for
your organisation?**

Leadership

Skills

Technology

Culture

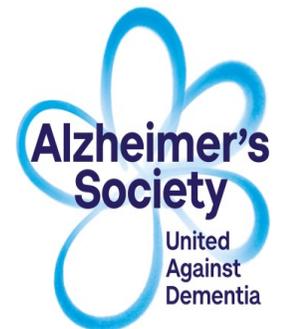
Governance

Processes

Data Strategy at Alzheimer's Society



19/05/2021



**Three years
ago...**

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Challenges

- Poor data integration and data sharing capabilities.
- No 360 view of the stakeholder.
- Struggles with technology.
- Heavy workload. Constant firefighting.
- Inconsistent practises. No clear direction.
- Unclear governance around systems and data
- Not understood by business teams

The Data Strategy

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Strategy Streams

Summary



Technology



People



Governance

Technology

Strategy Stream

Why We do not have the tech to properly work with our data.

What We need to acquire the right tech which brings additional value

Governance

Strategy Stream

Why We do not have appropriate governance over our systems, data, and practices. Introduces risks and reduces efficiency.

What We need to introduce and enforce proper governance structures and processes.

People

Strategy Stream

Why Current situation is not going to give the level of support for the whole organisation.

What We need the right skills, roles and relationships to deliver

**How do you
present a
strategy people
will listen to and
remember?**

**How long does
it take?**

**How long does
it take?**

**How do you
keep the
strategy alive?**

Q&A

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The Onchocerciasis Elimination Mapping (OEM) project uses mobile phones to collect data while in Nacula community, Anchilo, Mozambique.

Business Integration Programme

More than just data

Matt Jago – Controller of Business Systems & Integration



Sightsavers

Business Integration Programme

“Ensuring our data and systems architectures are fit for purpose and support organisational strategy and effectiveness through timely and insightful management information”

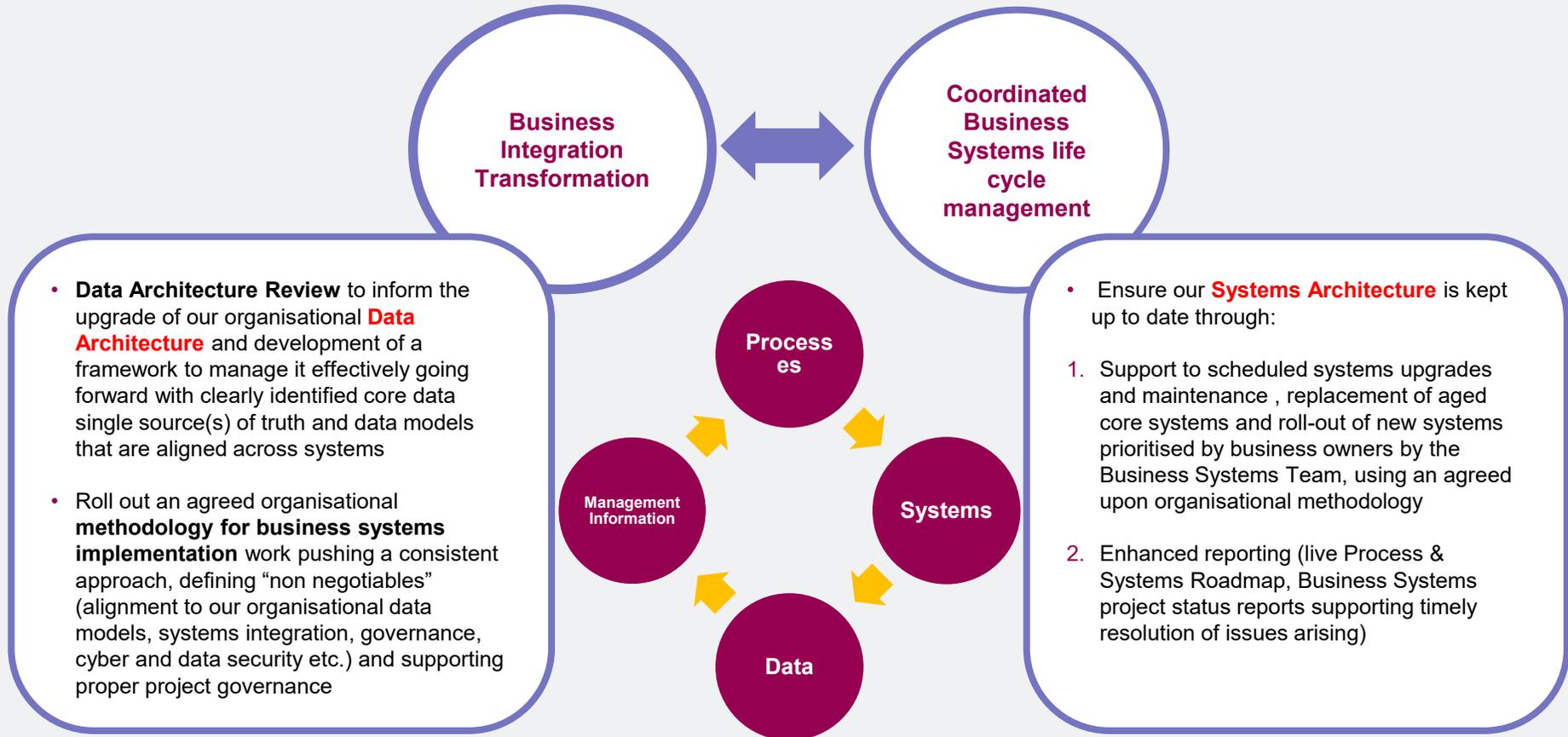


Business Integration Programme

Some key drivers impacting organisational management information have emerged from the recent “Strategy Refresh” process undergone by the organisation.

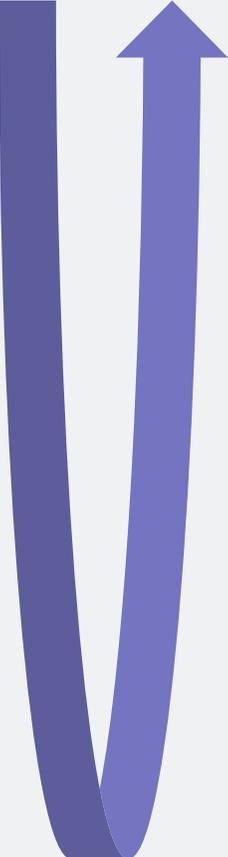
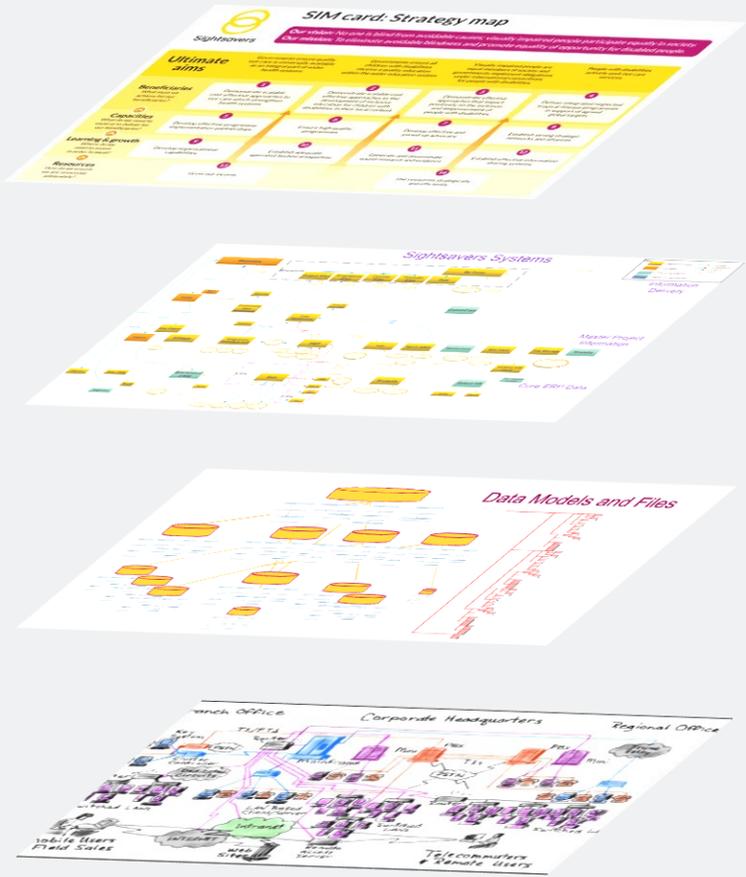
- Data and evidence are at the core of our new thematic strategies in support of positive and sustainable outcomes for our beneficiaries
- Continuing emphasis on demonstrating good governance, effective assurance and internal controls
- Our operating environment is complex and volatile, and our management increasingly needs to be adaptive and agile

Business Integration Programme



Architectural scope

 In scope
 Partly in scope
 Not in scope



Business Architecture
 Organisation Strategy and Vision,
 Business Processes, Corporate Reporting

Application Systems Architecture
 Application Portfolio, Functional
 Requirements, Internal Reporting

Data Architecture
 Key List Data, Information flow, File Store,
 Master Data model

Technology Architecture
 Infrastructure, Communications, Security,
 Physical Components

Business Integration Programme

Key Objectives & Approach / Current Progress

Document Baseline

- Document our current reporting requirements
- Map our current reporting processes
- Inventory of current systems, data sources, data categories, fields, process flows, dependencies (baseline architectures)

Identify Opportunities

- Identify systems integration issues. Identify current gaps in data or available reports
- Identify opportunities for streamlining and automating reporting processes
- Assessment of current data warehouse
- Retiring obsolete reporting processes
- Establish ownership of systems and datasets

Propose Future State

- Propose target architectures (data, systems) and common data model to support future state
- Propose data platform solution to support future state
- Propose architecture management framework for the organisation to support future state and support continuous architecture improvement

Propose Roadmap to future state

- Develop roadmap (with cost estimates) to future state (through the data evolution, from data aware, data informed, data driven to data centric) with cohesion, efficiency and VfM at the core
- Make recommendations on suitable technology solution(s)
- Make recommendation on business-as-usual organisational structure

Implementation of future state

Thank you!





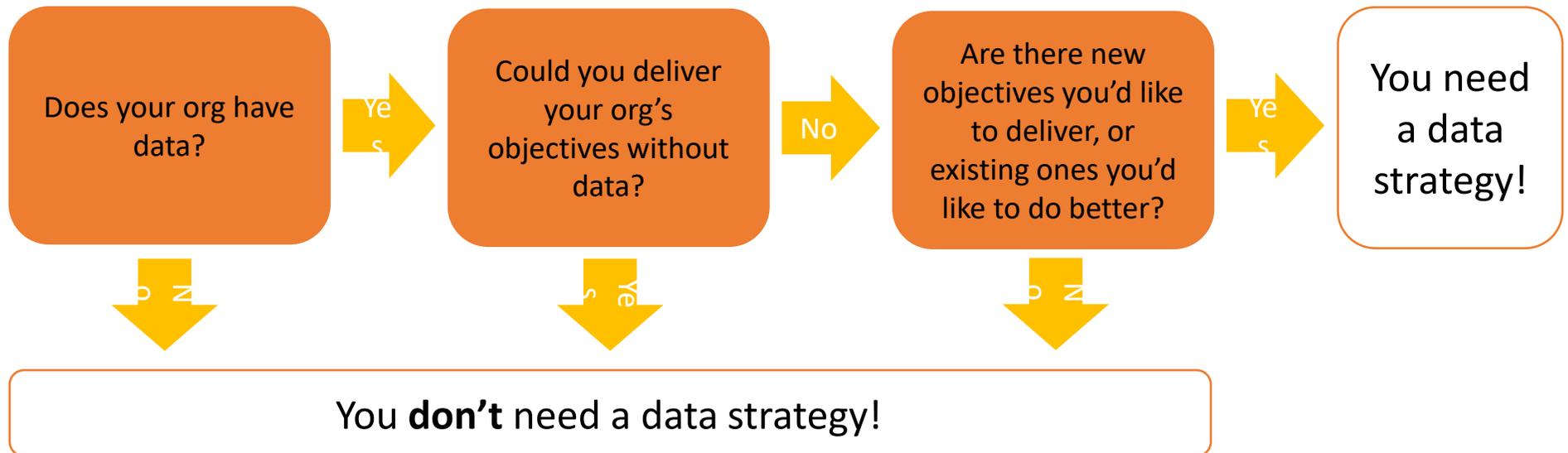
How to use Data Use Cases to develop a Data Strategy

Case Study: How the Advertising Standards Authority increased funding from social media owners

Joanna Fulford
Associate Consultant
Adapta Consulting

Photo by [Szabo Viktor](#) on [Unsplash](#)

Do you need a data strategy?



A data strategy is aligned to your organisation strategy and outlines how you need to manage your data to enable you to solve problems or provide you with missing information.

Where to start



Step 1 – identify the problems and questions

Step 2 – flesh out the details of each data use case

Step 3 – consolidate the data use cases

Step 4 – create a plan and a roadmap

Step 1 (identify problems and questions)



Data use cases are the specific problems or questions you want to address e.g.

- We want to reduce supporter attrition.
- How do we deliver advice to hard to reach communities?
- Can we predict demand for our services?

Step 2 (develop each data use case)

- What data do you need?
- How will you gather it?
- How will you store it?
- How will you analyse it, or get a different type of value from it?
- How will you share the insight, or demonstrate the impact with those who need to act on it?
- Who will produce, use, and look after the data?
- What software and hardware will you need?
- Who will own this data use case?
- Is there any governance in place for ensuring this data is fit for purpose, used the right way and kept secure?
- Do you have the skills in-house already, do you need to upskill, or use external services or support?
- What is the impact on the organisation of pursuing this data use case? Is culture change required?

Step 3 (consolidate the data use cases)

Group the data use cases into themes e.g.

- Understanding supporters
- Extending reach
- Optimising supporter journeys

Identify the cross-cutting requirements e.g.

- Data governance is lacking
- Hardware for data collection needs to be mobile and accessible to volunteers
- More data needs to be collected from supporters
- Leadership is required to shift from reactive to collaborative

Step 4 (plan and roadmap)

- What needs to be done?
- What are the resource implications? What can be done with little or no budget? Can you get funding if you build the business case? What capacity do staff have? How long will it be for staff to benefit?
- What are the dependencies between the data use cases (e.g. you want to profile your database and define your audiences before you begin work on supporter journeys)?
- What are the constraints from beyond this ideal plan (e.g. your CRM system is being upgraded later this year, you have to wait for the budget cycle, organisation restructure...)

Case study: Advertising Standards Authority (ASA)

UK's regulatory body for the advertising industry

Founded in 1960s

A self-regulated industry: funded by levies

Began handling complaints about online ads in 2000s

Gap: own websites and content on third party space under advertisers' control i.e. social media

'Online Remit Extension' in 2011 closed that loophole: 300% growth in 12 months

By 2014 30% of complaints received, by 2019 almost 50%

Exponential growth of online work but **no extra funding**

No levy collected on social media, paid-for search, influencers...

Case study: Advertising Standards Authority (ASA)

Categorisation of complaints had evolved organically, was outdated and lacking detail (relevance)

Values offered on online complaint form and used in annual report were not meaningful and gave impression of out-of-touch organisation (brand and customer experience)

Complainant may not provide enough detail of where they saw the ad (completeness)

Laborious for case handlers to determine (inefficient) and categorisation often guesswork (inaccurate)

Lack of reliable data on ads on social media or paid-for search-
> **unable to make evidence-based case for funding with Google, Facebook, Instagram etc** (sustainability)

ASA Data Use Case – Engage industry stakeholders

What data is needed <ul style="list-style-type: none">•Media type•Social media platform/Search engine as appropriate•Screenshot/URL of ad in context as appropriate	Source <ul style="list-style-type: none">•Complainants to provide the data on online complaint form•Hierarchical values and questions•Case handler to validate/amend	Storage <ul style="list-style-type: none">•Case handling system (Dynamics CRM)	Analysis <ul style="list-style-type: none">•BI developer to create BI report/view	Consumers <ul style="list-style-type: none">•SLT•ASA Council/Board•Case handlers•Communications team•Social media and search engine companies•Advertising industry
Custodians <ul style="list-style-type: none">•ASA IT team•CMS partner•Dynamics CRM partner	Technology <ul style="list-style-type: none">•Existing tools all fit for purpose but require customisation to support changes to data model and business process	Ownership/ Governance <ul style="list-style-type: none">•Director of Complaints & Investigations owns case data and ad data as well as this data use case	Skills <ul style="list-style-type: none">•Provide plain English guidance to complainants on webform•Training to staff on new values and structure	Change <ul style="list-style-type: none">•Cross-org agreement on new taxonomy•More complexity in data•Less time spent on data entry

Engage industry stakeholders: The Plan



Establish new taxonomy - to incorporate media types, social media platforms, search engines, in-game advertising, as well as



Update business processes



Design new reports/dashboard views



Brief internal and external developers on system requirements,



Brief/train all staff on changes to values, process and systems



Retrospectively apply top level values to 2019 and 2020

Objectives met

- some platforms have increased their contribution considerably (increased funding)
- greater transparency welcomed by the industry stakeholders (confidence in the self-regulatory system)
- opened up conversation with influencer agencies (new funding opportunity)
- collection of data more efficient, accurate and complete (more reliable)
- terminology more relevant to complainants and all consumers of the data ('in touch')

About your complaint

- Are you complaining as a member of the public?
- Are you complaining as a business/company/sole trader ab
- Are you complaining on behalf of an organisation or body w your complaint?

Type of Advertisement:

Online

Please now select one of the following:

On social media

What type of ad was it? *

Influencer or affiliate advert

What social media platform did you see the ad on?

Instagram

Can you give us the web address (url) of the ad or th

Complaints and cases resolved by media

Complaints about outdoor ads decreased by **56%**

Online complaints increased by **4%** and made up almost **1/2** of all complaints

Television complaints increased by **43%** but only made up **1/5** of all cases

Media	2020		2019		Complaints	Cases
	Number	% +/-	Number	% +/-		
Online	17,379	4%	14,512	-2%	16,767	14,775
Television	14,211	43%	5,070	-3%	9,971	5,216
Email	1,134	4%	1,043	2%	1,094	1,024
Radio	843	-5%	498	-17%	887	598
Outdoor	785	-56%	415	-44%	1,787	744
National press	706	30%	370	-15%	544	437
Packaging and point of sale	485	-48%	470	-47%	936	890
Leaflet, brochure, catalogue or directory	472	-41%	408	-43%	801	717
Other	394	3%	336	2%	382	330
Direct mail or circular	274	-49%	223	-38%	533	358
Local or regional press	237	-8%	90	-52%	258	188
Magazine	184	-31%	153	-25%	266	205
Transport	155	-57%	102	-53%	359	219
Cinema	59	-68%	26	-75%	186	102
Press other	47	-59%	33	-66%	115	98
Ambient	24	-23%	19	-14%	31	22
Phone call	7	-	7	-	0	0
Total	37,396	7%	23,775	-8%	34,917	25,923

Online complaints and cases broken down

Complaints about influencer posts decreased by **8%**, but still made up almost **1/4** of online cases

Online media	2020		2019		Complaints	Cases
	Number	% +/-	Number	% +/-		
Website, social media or app (own site)	8,341	-8%	7,334	-12%	9,035	8,338
Website, social media or app (influencer)	4,066	-8%	3,355	-9%	4,401	3,670
Website, social media or app (paid ad)	3,150	66%	2,682	61%	1,894	1,663
Video on demand	1,008	78%	433	44%	567	300
Search	367	5%	336	6%	348	318
Game	273	-32%	226	-39%	403	373
Messaging app	106	23%	94	12%	86	84
Audio podcast or on demand	50	NA	34	NA	NA*	NA*
Website, social media or app (other)	13	-59%	13	-54%	32	28
Augmented or virtual reality	4	NA	4	NA	NA*	NA*
Viral	1	0%	1	0%	1	1
Online total	17,379	4%	14,512	-2%	16,767	14,775

* No 2019 figures are available for this media type.



Thank you for listening

Joanna Fulford
Associate Consultant
Adapta Consulting

Breakout sessions will discuss:

How do we bring together all those different data sources – including the data that our members or supporters create themselves?

What new skills and/or experience might we need within our teams to be able to implement new approaches to and opportunities with data?

Breakout Room Discussions



Poll, Thanks & Goodbye!

Upcoming events...

21 July 2021 – Accounting Packages and Cake

www.adaptaconsulting.co.uk/adapta-events

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