# 360° View of a Constituent for a National Non-Profit

## THE CHALLENGE

Hundreds of millions of data points mixed with multiple one-off reports from multiple sources equaled a recipe for flawed, dirty data and an unclear view of engagement.

## THE SOLUTION

A simpler database to hold complex data from multiple sources for efficiency and accuracy and a clear view of member behavior.

## THE RESULTS

Unlocked intelligence for more strategic business decisions with simple views and easy reporting.

# Unlock the Intelligence

A large non-profit organization was trying to reinvent themselves through a new online community that combined grassroots efforts and targeted marketing campaigns to grow awareness and involvement among their volunteers and constituents.

But one thing was lacking: an overall understanding of the activity of their constituents. How are people involved? Who is using the website? Who is active in the online community? Who was going to the local meetups? Is our universe growing? Without this information they were unaware if their online community was making an impact for their business and their mission.

Sure, there was data. There was a lot of data. In fact, there was hundreds of millions of data points. They were using Power BI and pulling multiple one-off reports, from multiple sources, with some duplicate data, and confusing visuals. There was concerns about data accuracy, and there was a board meeting approaching.

All the systems were in place, but the intelligence needed unlocked.

Turns out they were doing the right thing, the wrong way. Their applications were feeding into a centralized place and then feeding information to Power BI, but it was a data warehouse that was not an enterprise solution.

They were able to pull Power BI reports, but there was too much duplication and the data was not accurate.

There was no way to get to the visualization they needed until we tackled the data first. We implemented a simpler, more sophisticated database that was enterprise ready and scalable. We gathered data from a variety of disparate systems (the hundreds of millions of data points) and consolidated it into a centralized constituent database.

To do this, we used Azure Data Factory and stored the data in an Azure Sequel Database, which has 125 million line items and growing.

Now that the data was flowing correctly, we tackled Power BI and their reporting. We were able to create new visuals that were more accurate and immediately, better information was at their fingertips.

## Cont'd...

In order to derive insights from data it must be accessible, easy, and accurate. This is what we created with a new centralized database and Power BI. This was a true partnership with the client. It was iterative and flexible as we learned how to show growth, how to pull out trends, and how to better understand their constituents.

Workflows were changed and business users were able to report confidently and correctly.

Although the ask was to show growth, as we understood their needs we were also created repeatable, more complex, reports on revenue, event attendance, geography, and adjusted the reports since different roles needed different views.

With this human approach, each view was customized to the organization and the end user to provide the least distraction, the most reporting, and intelligent insights.

Through conversations, iterations, and implementing user experience and design best practices, we created simple dashboards for the board that contained key KPIs, and deep dive reports for specific business users.

Through our work, new intelligence has been unlocked and better, quicker, and more strategic business decisions can be made.

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