

WHOSE FAULT IS IT THAT MY DATABASE IS RUBBISH?



It's a complaint echoed in membership organisations up and down the land: your database just doesn't do the job you want it to do. But is this the fault of the vendor that sold it to you, or is it just that you don't know how to work it properly?

Alex Blyth reports

When they work, databases are great. The British Psychological Society installed Stratum from APT Solutions in April 2001, and Graham Bennett, business information manager, says: "It now is a vital element of our membership applications, mailing campaigns, subscription renewals, publication purchases, merchandising, event management, student assessment tracking, and committee list maintenance."

He continues: "It's user-friendly. Before we had it, we had to spend around three days manually putting the right magazine inserts in the right envelopes, and now the database does it in 30 minutes. We can see a full correspondence log for every member at a glance. Our membership records are integrated with our finance records. The system isn't perfect, and we're always developing it, but now we wouldn't manage

without it." However, this seems to be the exception, rather than the rule. While databases promise so much, all too often the reality fails to live up to the promise. Ask anyone in a membership organisation who uses a database what they think of that highly expensive tool that was meant to improve their working lives, and in almost every case they will complain about it.

So, where do they go wrong? Very often they blame the database vendors, accusing them of over-selling and under-delivering. Indeed, there are unscrupulous vendors out there who do this. Yet, there are even more honest vendors selling systems that can work, as the experience of the British

Psychological Society demonstrates. In fact, there is much that membership organisations can themselves do in the procurement, implementation and management of their databases to ensure that they are successful.

Seen as a job for IT

The first reason why membership databases go wrong is that they are seen as a job for the IT department. Keith Collins, systems director at Purple Vision, a consultancy that advises membership organisations in this area, says: "Very often organisations assign database projects to IT departments, but the problem with this is that IT departments rarely understand the needs of membership departments. They tend to focus too much on the back-end, without thinking about what the actual users will need it to do. The back-end is of course relevant, but it should never be the most important aspect of database procurement."

Poor selection process

Poor selection process is a common reason for database failure. A database is a major investment for any organisation and yet the procurement process is frequently informal and ill-considered. Very often a membership organisation will lack in-house experience

"The key to a successful database is a project manager who understands how the organisation works and has the authority to make decisions."

of database procurement, and in those circumstances it is usually advisable to bring in external consultants. They will charge for their services, but their cost will be much lower than the cost of ending up with a database that is more hindrance than help.

The Evangelical Alliance UK represents over one million Christians in the UK. In 2001

it decided to source a new database, and its process is a good example of how to procure a database. It was clear what it wanted the new database to do: initially to replace its membership and events databases and then eventually its 25 other smaller databases held in Access and Excel.

It put together a comprehensive proposal detailing its needs and presented this to the trustees. Four independent IT directors of other charities then validated the proposal. Using a consultant to help put together an invitation to tender and source potential suppliers from the hundreds of possibilities reduced the project duration by months.

To compare suppliers Evangelical Alliance devised a scoring system that ranked the functionality it required against the shortlisted systems. It ended up with Progress and report that it is now functioning superbly and contributing to the effective running of the organisation.

Not maintained

Many organisations believe that once they have bought the right database all they need to do is plug it in and wait for it to solve all their problems. They are wrong. Procurement is only the first step. It is essential to ensure that the database is properly maintained, and this requires the allocation of ongoing resource. Richard Boler, managing director for the southern region of Technology Service Group, a database vendor, says: "The key to a successful database is a project manager who understands how the organisation works and has the authority to make decisions."

While it is important that one person is responsible for the database, this should not mean that everyone else in the organisation abdicates responsibility for maintaining its accuracy. Guy Tweedale, managing director of Northern Europe for CRM vendors Saratoga Systems, says: "The best way to keep data accurate is to embed membership renewals, special offers and cross-selling as business processes that drive the operator to call the member and update their details as part of the process. This gives ownership of the data to everyone in the organisation."

Crucially, all users must be properly trained on how to use the database.

Case study

Royal College of Radiologists

The Royal College of Radiologists had been using a heavily bespoke, UNIX-based database for 12 years. The system, which was used for managing the College's membership and exams, was becoming dated and increasingly costly and problematic to maintain.

The College also wanted to explore the potential of a web-integrated database. So it looked for an integrated, SQL server-based database which would add significantly to the functionality of the existing system.

In the end the College chose CS Group's Integra, citing the "continuous development path of the product, broad range of functions, flexibility and high level of integration". Peter Lumb, ICT officer at the Royal College of Radiologists, says: "Integra met all our key requirements. The exams, committees and events modules as well as the web tools really impressed us - they offered the best functionality in the market."

The College began integrating its website with the Integra back office database in December 2005. The website now features a members' area with ability to update members' details, a members' directory and the capacity to buy publications and book events online. Lumb says: "As a professional body we need to be able to control the areas each member sees on the College website. The attributes in Integra enable us to do this easily and efficiently."

The integrated, organisation-wide database has improved data accuracy, reduced manual administration tasks and the integrated website has enabled the College to offer better facilities and services to its members. "The new online services we offer our members have been well received. Since the launch of the integrated website the number of members' web registrations has gone up from 3,500 to 6,700, which means that nearly 100 per cent of our members are using the online services. Despite the growth in our online offering, our members have reported fewer problems than before," says Lumb.

"Integra has also saved us money - we're now publishing our member directory only in electronic format on our website, which has saved us three weeks' staff time and approximately £8-10,000 of printing, design and mailing costs."

Quality of data has also improved - the College now gets only four email bounce-backs due to invalid email addresses per month compared to the previous 500 per month.

Next the College is looking at bringing onstream other functionalities such as online subscriptions and payments functionalities.

Too often the organisation trains everyone when the database is first installed, but then fails to include it as part of the induction for new members of staff. This means that over time a growing proportion of the organisation's employees are using the database without training. Where this happens it rarely takes long for the integrity of the data to be compromised.

Too focused on membership

Rob Barr, not-for-profit membership sales manager at CS Group, a software vendor which provides systems to organisations such as the Royal Institute of British Architects and the British Bankers Association, says: "Often systems are put in purely to meet the needs of the membership department, but, as far as I'm aware, there's no organisation that offers only membership. They all have a wide range of services and activities, and the organisation should ensure that the database is integrated with them. For instance, you should be able to see that a person has come to three events and bought two publications in the last year, and so is a good membership prospect."

Another reason why databases fail is because they require too much work to

Case study

British Association for the Advancement of Science

The Association exists to promote science in the UK. Membership is free and it has 2,000 voting members and a further 6,000 members who receive its communications. It uses Progress from Fisk Brett to hold details of those members, to communicate with them and to record to financial and communication history with each one.

Supporter development officer, Emily Dean, says: "We bought Progress two years ago, and before then we'd rented the front end of a database. It wasn't a good solution because there was a lot of duplication and we couldn't manipulate the data in any way. We saw a few options and chose Progress because it integrates well with Microsoft applications like Word and Excel, and with our financial software."

The organisation imported the data from the external database and found that initially it needed a lot of cleaning. The next issue for Dean was to ensure that users within the organisation kept it clean. She says: "We've integrated data cleansing into people's day-to-day work. We're all responsible for it, and gradually the database is becoming seen as the central source of information on our members."

In the future she intends to use it more for her direct marketing activity. She says: "We're dependent on donations for our income and Progress will be able to help us profile potential members and so target our efforts more effectively."

She concludes with this advice on procuring a database: "Give yourself a long time to find the right system and then to implement it properly. Produce a detailed specification of what you need. Approach several companies. We found four to be a good number. Use an experienced consultant at the key stages of buying and going live. Develop detailed procedural notes, so that knowledge of how to run your database is not kept with just one person."

30th April - Edinburgh

1st May - Manchester

2nd May - Birmingham

3rd May - Reading

4th May - London

Tame your Information Beast



Exhibiting companies include:

- ABBYY Europe GmbH
- Active Navigation Ltd.
- AIIM Europe
- AnyDoc Software
- Avanquest
- Beta Systems Software AG
- Bowe Bell and Howell Scanners
- BSI - British Standards
- Canon (UK) Ltd
- Capita Randall Lyons Limited
- Captaris International
- Capture Projects Limited
- Cimtech Limited
- Civica UK Limited
- Cornwell Management Consultants
- Datawatch International
- Deltascheme Limited
- DICOM Technologies
- DRS Data Services Ltd
- EASY SOFTWARE UK
- e-Does UK
- Eicom ITG Ltd
- EMC
- FileNet, an IBM company
- Fujitsu Europe Limited
- Headway Technology Group
- Hyland Software (UK)
- Hyperwave UK Ltd
- IDDX plc
- Imaging Business Machines Limited
- Imscan Systems Ltd
- In-Form Consult Limited
- Informed Imaging Limited
- Kodak Limited
- Lectus Limited
- LMB Stor-a-File Ltd
- Morse
- Nuance Communications Inc
- OITUK Ltd
- OPEX INTERNATIONAL
- Panasonic UK Limited
- Paralogic Limited
- Perceptive Software Ltd
- Plasmon Data Limited
- PTC
- RSD UK Limited
- s.a.x Limited
- SAPERION (Schweiz) AG
- Top Image Systems
- Xenos Europe Limited

AIIM Roadshow 2007

The FREE Information Management education event

For further details call
01905 727600 or visit
www.aiimroadshow.org.uk

It's all about how you MANAGE your:
documents, records, emails, paper, invoices, forms...

- Spend a day at the AIIM Roadshow & learn how to:
- Improve process efficiency and cut costs
 - Provide faster and more reliable customer service
 - Ensure regulatory compliance and reduce risk
 - Enable collaboration for employees and partners

keynotes • case studies • roundtables • advice centre



maintain. It can be onerous and time-consuming to add or amend records accurately every time, and very often organisations or individual employees decide it is too much trouble, and allow the database to fall into disrepair.

Increasingly organisations are using the internet to reduce this data inputting burden. Anita Curry, business development director of Fusion Workshop, an online database provider, says: "Having an online database means your members can input and update their own details, at a stroke removing hours of tedious inputting for your staff. It also allows you to build a more dynamic virtual community of members."

Vendors' inaccurate quotes

Of course in some cases databases go wrong because of the vendors. There are unscrupulous companies that sell inappropriate, badly-designed systems, and buyers should ensure that their procurement process is rigorous enough to weed them out. However, even the best vendors can cause problems for their customers by providing initial quotes that make them appear very competitive on price. Collins at Purple Vision explains: "Vendors want to win business, so they'll often quote low to get the contract signed, and only then start to reveal the costs of installation, training and consultancy. For a small database these will be about half of the total cost, for a large one they will be about two-thirds. Membership organisations are usually reluctant to meet these further charges, and so the database sits there unused and ineffective. Buyers should make sure the price they're quoted is the total cost."

Not paying enough

However, another reason why databases go wrong is that the membership organisation has simply not spent enough on it. Niroo Rad, managing director of ASI Europe, which provides its iMIS solution to over 1,800 associations worldwide, says: "A small to medium-sized membership organisation looking to use a database for the essentials such as member management, processing orders, billing, event management, managing relationships and having seamless communication between front and back office systems should budget for somewhere between £35,000 and £75,000. They should expect a return of 18 to 34 per cent within the first year."

Finally, databases must be future-proofed. Caroline Worboys, chief executive of vendor Broadsystem, says: "Databases evolve. To accommodate the increasing amount of data you want to hold on members and prospects, build in the flexibility to accommodate email addresses, mobile phone numbers, international addresses and so on. It will mean that you will need greater flexibility in each row and each column, but the extra effort and investment is definitely worth it in the long run."

Many organisations are now looking at the possibilities in online databases. Colin Reed, European sales manager at Blackbaud, which sells the popular Raiser's Edge database, says: "The internet is allowing membership organisations to interact with their members. There's no longer any excuse for a member to feel like just a name on a mailing list. They should be engaging online with the organisation and with other members, and really feeling part of something."

So, there is a lot to get right to ensure your database works as you would like. The good news is that it can be done. The British Psychological Society is not the only membership organisation to be happy with its database. There are many organisations that have done all of this work and now have a database that helps them to acquire new members, keep existing members, and provide outstanding services to those members. They would all argue that making the extra effort with a database is always worthwhile. ●

7 top tips

Robin Fisk, managing director at Fisk Brett, offers these top tips on making sure your database doesn't go wrong:

- 1 Think about how all departments will share one central contacts database.
- 2 Consider who needs to gain access to what, and from where.
- 3 Ensure your candidate database supplier has business process consultants, and a proven implementation procedure.
- 4 Make it someone's job to be responsible for its effectiveness to your organisation.
- 5 Identify the quick wins. For example, importing standing orders from the bank electronically may save you days each month.
- 6 Look after your data. Make sure it is backed up, and check from time to time that it can be restored.
- 7 Make your database supplier your friend. It's amazing what you can get for nothing!

"Databases evolve.

To accommodate the increasing amount of data you want to hold on members and prospects, build in the flexibility to accommodate email addresses, mobile phone numbers, international addresses and so on."