Generosity REPORT

Spring Clean Your Database:
5 Steps to a Campaign-Ready Database

Spring is in the air, and while you may be thinking about decluttering your closets and deep-cleaning your home, there's another area that might need some freshening up—your donor database.

A well-organized database is your secret weapon for campaign success. Like an overstuffed closet, donor records can get cluttered with outdated information, duplicate entries, and missing details, making it harder to engage supporters effectively. This is the perfect time to spring clean your data and start fresh.

1. Tidy Up Your List Before diving into outreach, run a quick database audit to catch what needs to be cleaned up—like duplicate records, outdated information, or inactive donors who haven't engaged in years. A tidy list sets the stage for more effective engagement.

2. Freshen Up Your Formatting Consistency is your best friend here. Standardize formatting across key fields like addresses, giving history, tags, and contact preferences. Cleaning up these details eliminates clutter and ensures every outreach effort is backed by reliable data.

3. Organize with Impact Donor segments should reflect current giving, engagement, and interests. Thoughtful groupings—like major prospects, recurring donors, or new leads—help tailor outreach and strengthen relationships. A few intentional updates now will boost connections and campaign results.

4. Polish Your Giving History Your donor data tells a story—keep it accurate and up to date. Reviewing giving history, frequency, and pledges helps tailor your outreach, identify donors ready to deepen their investment, and strengthen relationships for more confident planning.

5. Turn Cleaning into a Habit Don't let your hard work go to waste—create a simple data hygiene guide and train your team to keep records consistent. Ensuring more than one person on your team can manage your CRM keeps your database protected and campaign-ready year-round.