

CHALLENGES	SOLUTION	BENEFITS
<ul style="list-style-type: none"> <li>• How to accurately match and more rapidly integrate 4,000 new constituents each month</li> <li>• How to reduce or merge known duplicates already in the Millennium constituent database</li> </ul>	<ul style="list-style-type: none"> <li>• The Millennium Data Quality Add-in powered by Oversight™:             <ul style="list-style-type: none"> <li>• Accurately divides inbound names into MATCH, MAY MATCH and DOES NOT MATCH categories</li> <li>• Simplifies research for MAY MATCHES by providing a single view of inbound and existing records</li> <li>• Monitors all daily changes to Millennium for possible duplicates thereby providing daily improvement to the master list quality</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Shortens the timeline for researching and integrating new names to days from weeks or longer</li> <li>• Improves the quality of the matching and the data for inbound names</li> <li>• Eliminates the cost of outsourced matching of bulk name lists</li> </ul>

## Increasing the speed and quality of new constituent integration with continuous monitoring produces immediate benefits for a large research organization Development Office, enhancing the value of their Sage Millennium implementation.

Fund-raising organizations face continuing data quality and name duplication challenges as a by-product of public campaigns, constituent self-service, and acquired lists. Time and budget pressures cause response to these challenges to be primarily manual, PC-based, or outsourced processes that are, at best, partially effective. Integrating continuous monitoring software with Sage Millennium is providing an excellent return on investment (ROI) through improved quality and more rapid name integration.

**Background:** This Development Office client maintains a mailing list of more than 1,500,000 constituents using Sage Millennium. Inbound gift, event and organizational new name flow averages 4,000 monthly. In addition, more than 1,000,000 names are annually leased from outside providers for special solicitations, resulting in thousands of additional donors being integrated into Millennium when a first donation is received. Although previous analysis had identified that more than 10% of the constituents in the mailing list are duplicates, it was a huge challenge just to keep people and processes focused on preventing new duplicates from being added each month., so little time was available to improve the master list's quality.



## Case Study: Sage Millennium Data Quality Add-on

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**Implementation:** After identifying key success factors (e.g. business and data quality requirements) with the project sponsor, detailed design specifications were gathered, documented, reviewed and refined for:

- Inbound file formats
- Rules and thresholds for what constituted a MATCH or MAY MATCH condition with an existing constituent on Millennium
- Workflow statuses to track MAY MATCH items to resolution as a match or non-match, along with processing instructions when it was a match to an existing name

Testing resulted in further refinements, particularly to the rules and thresholds for matching.

**Outcome:** Visual Risk IQ's Sage Millennium Data Quality Add-in is in daily operation. On days when no inbound name files exist, the solution is identifying any changes or additions to the Millennium master list that are likely duplicates of existing constituents on the list. Personnel previously burdened with full-time resolution of inbound name matches are completing their work more quickly and with greater accuracy, and without the need to outsource research or analysis.

**Future Plans:** The advanced analytics, data scrubbing and "fuzzy matching" capabilities of the Sage Millennium Data Quality Add-in solution platform make it an excellent tool to take on other complex data quality activities that can further improve the integrity of the Millennium master. Other enhancements under development include:

- Adding a query to identify POSSIBLE FAMILY members among inbound data since identifying family relationships assists in customizing correspondence and increasing donor engagement.
- Automatically standardizing names and addresses into the formats preferred by development officers, to optimize Postal Service mailing costs while personalizing correspondence.

“Being able to greatly improve the matching accuracy while shortening our cycle time and has had the trickle-down effect of reducing rework caused by intervening changes to Millennium. All this while we are also realistically addressing the existing duplicates in our master list.”

- Client VP of Operations

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**About the Firm:** Visual Risk IQ was formed in 2006 to help large, complex organizations take advantage of new technologies for continuous auditing, continuous monitoring, visual reporting and risk-focused data analysis. We are alliance partners and implementation specialists for Oversight Systems, Caseware Monitor, and ACL Services and deliver tailored solutions for our clients both directly and in concert with other implementation partners.



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