

# The Data Wrangler's Playbook

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Turning Data Chaos into Strategic Success

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# Introduction

Your data is one of your most valuable assets — but do you have an expert (or team of experts) specifically tasked with keeping it clean, up-to-date, and reliable? Despite its importance, many member-centric organizations lack dedicated specialists to manage their data. Imagine running your accounting or IT department without skilled professionals — the results would be chaos.

This whitepaper provides strategies and tools your organization can start using now to address data management challenges, explore the role of a “Data Wrangler,” improve overall data governance, and achieve continuous performance improvement.



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# 01 Discovering the Power of “Clean Data”

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**Clean data** is not just a buzzword, it's the foundation of your organization's effective stewardship. To be truly useful, your data must be accurate, complete, up-to-date, consistent, and free from duplicates and inconsistencies. But, as we all know, this is harder than it sounds.

## Why Clean Data Matters

-  **Decision-Making:** Clean data removes uncertainty. With accurate, trustworthy data, your executive team can make confident, well-informed business decisions.
-  **Operational Efficiency:** Clean data ensures your systems and processes run smoothly. Data inaccuracies and inconsistencies lead to inefficiencies, delays, and wasted resources. When data is clean, workflows are streamlined, and teams can focus on high-value tasks rather than fixing data errors.
-  **Personalization and Engagement:** To deliver a personalized member experience through your website/engagement portal, email communications, and social, you need to start with clean data. It's essential for delivering highly targeted campaigns.
-  **Reliability:** Data discrepancies between your departments or systems can cause confusion and mistrust. Clean data fosters a culture of trust, enabling alignment across your various teams.
-  **Preparing for Emerging Technologies:** The importance of clean data goes beyond your current needs. Utilizing a single source of reliable data positions your organization to take advantage of new technologies, such as artificial intelligence (AI), machine learning (ML), and predictive analysis that can greatly impact your organization's future.

## 02 Identifying and Conquering Your Biggest Data Challenges

Before you can effectively resolve your data issues, you need to understand the specific challenges your organization is facing. Data problems are rarely isolated, they often stem from larger systemic issues that affect multiple areas, including:

<b>Data Distrust</b>	Employees often don't trust the data they receive due to inconsistent formats, outdated information, or suspected inaccuracies. So, they try to verify it by manually checking reports or using external tools. This causes more work and slows down decision-making.
<b>Bad Data</b>	Bad data is common and is often the result of poorly implemented data-entry processes, lack of oversight, or inconsistent systems. Common issues include: <ul style="list-style-type: none"><li>• Duplicate records</li><li>• Incomplete or outdated information</li><li>• Data-entry errors</li></ul>
<b>Missing Information</b>	Data gaps — such as incomplete member profiles or unrecorded activities or transactions — can degrade the member experience, affect marketing campaign success rates, and lead to inaccurate reporting.
<b>Inconsistent Terminology</b>	Different teams may use different terminologies for the same concept; this can lead to confusion and can make reporting difficult.
<b>Business Decision Gaps</b>	Member-centric organizations often struggle to extract actionable insights from their data because they don't have the right tools or staff don't have the necessary analytical skills. So, you might miss important strategic opportunities.
<b>Data Flow and Maintenance Issues</b>	Poor data flow between different systems, platforms, or departments can cause data silos. This leads to bottlenecks, delays, duplication, or data discrepancies.

## 03 Defining the Critical Role of a Data Wrangler

**Data Wrangling** is the process of cleaning, transforming, and organizing member data into a consistent, accurate, and reliable format your organization can leverage. A **Data Wrangler** is pivotal in establishing and maintaining the health and usability of your data. Filling this important role will drive better decision-making, enhance operational efficiency, and minimize your risk.

### Key Benefits of a Data Wrangler:

- ✔ **Reduces Redundancies:** Data wrangling eliminates duplicate records and silos, thereby minimizing errors across departments.
- ✔ **Improves Trust:** A Data Wrangler ensures data quality and fosters trust in the data, which is essential for well-informed, reliable decisions.
- ✔ **Mitigates Risk:** Poor data governance and wrangling can lead to significant risks, including data breaches, non-compliance, and reputational damage. A Data Wrangler helps ensure data is secure, protected, and used responsibly.
- ✔ **Increases Agility:** With clean, organized data, you can quickly adapt to evolving member needs and ensure a highly personalized experience that keeps pace with emerging trends.
- ✔ **Ensures Regulatory Compliance:** A Data Wrangler will enforce data hygiene practices to ensure your organization adheres to compliance requirements.

*Data Wrangling is Everyone's Responsibility - But You Need an Expert*

Many organizations have a data wrangler who wears many hats and shares responsibility for executing data governance strategies. The wrangler doesn't need to be a full-time, dedicated position. Some organizations form a committee that regularly reviews plans and shares tasks - this can also work. But it's still important to **appoint one person who is ultimately accountable for ensuring your plans remain on track.**

## Key Data Wrangler Responsibilities



**Data Governance:** Establishing and enforcing policies, frameworks, and procedures to maintain data quality, security, and privacy across your organization.



**Data Inventory:** Mapping all organizational data to understand its flow, ownership, and vulnerabilities, ensuring a comprehensive view of the data landscape.



**Data Auditing and Cleaning:** Regularly reviewing and correcting inconsistencies, missing values, or errors to maintain accuracy and usability.



**Collaboration:** By fostering collaboration on data governance and processes across departments, your organization can improve data collection and analysis, ultimately driving better overall performance.

## Specialized Skills

When considering a data wrangler, you have four basic options:

-  Appoint a wrangler from within your existing staff
-  Hire a new staff person with wrangling experience
-  Outsource to a contractor with experience in this area
-  Form a committee to oversee your efforts (you'll still want to identify an expert who keeps the train moving)

In particular, you'll want to look for a data wrangler/point-person who:



**Is Tech Savvy:** They should have a strong working knowledge of your member management system. IT experience is helpful but not essential. Your candidate might be an experienced Member Services, Marketing, or Accounting professional with deep institutional knowledge.



**Communicates Well:** This person will need to collaborate with teams across the organization; they will need to have a positive attitude and be a good communicator. A sense of humor is always helpful to overcome awkward discussions.



**Builds Consensus:** Different departments may have their own processes that they're reluctant to change; a successful data wrangler will understand how to motivate your troops.



**Pays Attention to Detail:** Ideally, your candidates will have exceptional organizational skills; project management experience is a plus.



**Believes in the Outcome:** Look for someone who understands the consequences of unreliable data and is comfortable championing the issue.

Depending on the size of your organization, **the Data Wrangler may wear multiple hats and not be completely dedicated to data management.** That's okay. It's important to start somewhere to demonstrate to your staff, members, Board, and other stakeholders that data governance is a priority.

# 04 Taming Your Data: A Ten-Point Plan

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To get your data in line, you'll need to lay the foundation for cleaner, more reliable data practices throughout your organization before the ten-point plan can be implemented.

## *Four Things You Need to Do Before Implementing the Ten-Point Plan*

1

**Create a comprehensive governance framework** that defines roles, responsibilities, and processes for maintaining clean data across the organization

2

**Map out all your data sources, systems, and departments** that handle data, documenting the flow of data, and identifying potential bottlenecks or silos

3

**Audit and clean your data** using automated tools and manual review to identify errors, inconsistencies, and missing information (**the right member management system can help with this**)

4

**Build user-friendly dashboards and reports** that give teams access to accurate, timely data with zero effort

# A Ten-Point Checklist

Here's our recommended ten-point plan you can use to get started in your data wrangling journey:

1.	<b>Create a Single Source of Truth (SSoT):</b> A member management system that offers a single source of data nearly eliminates duplicates, provides access to reliable data across your organization, reduces your costs, frees you from relying on IT, and gives your staff more control. More on this in the next chapter.	
2.	<b>Engage your stakeholders:</b> Make data governance a shared responsibility across all departments to signal its importance to the entire organization.	
3.	<b>Automate Data Processes:</b> Leverage data cleaning tools that automate the data validation, error detection, and correction processes.	
4.	<b>Standardize Terminology:</b> Develop an organizational glossary for key terms to avoid confusion and ensure data is interpreted consistently across departments.	
5.	<b>Implement Validation Rules:</b> Set up automated validation rules to prevent errors during data entry and help catch issues at the source.	

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| 6.  | <b>Perform Regular Audits:</b> Schedule periodic data reviews to keep data clean and accurate over time. Regular audits prevent problems from mushrooming later.              |    |
| 7.  | <b>Adopt Standardized Formats:</b> Standardize data formats across systems to ensure consistency and reduce the risk of integration issues.                                   |    |
| 8.  | <b>Prioritize Security:</b> Implement data security protocols, including encryption and access controls to protect sensitive information from unauthorized access.            |    |
| 9.  | <b>Continuously Train Staff:</b> Ensure your team has the knowledge and skills needed to manage data effectively by offering regular training and upskilling opportunities.   |   |
| 10. | <b>Foster a Data-Driven Culture:</b> Encourage all teams to recognize the value of clean, accurate data. <b>Make data governance part of your organization's core values.</b> |  |

## 05 Creating a Single Source of Truth (SSoT)

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A Single Source of Truth (SSoT) — such as one designed specifically for associations — eliminates the need for costly customizations and IT dependence. It offers native solutions for member management, member engagement and finance/accounting while offering seamless integration with best-in-class specialty applications.

- ✓ Lowers your costs
- ✓ Won't interrupt your upgrade path
- ✓ Provides advanced business intelligence with the robust analytics, reporting, visuals, and dashboards you need

An SSoT isn't just for large organizations; there are powerful yet affordable solutions on the market for associations and non-profits of any size.

### *Why a SSoT Is Important*

- ✓ **Personalized Member Experience:** Offers tailored communications and self-service options, unified transactions, and single sign-on — which all help to improve engagement.
- ✓ **Efficiency:** Eliminates data silos, ensures real-time insights, and reduces reliance on customizations.
- ✓ **Seamless Integration:** Enables no-code integrations and seamlessly integrates with best-in-class specialty applications you may need.

## 06 Keeping it Fresh

Your member data is constantly evolving, and your data governance needs to keep up. Ongoing attention and care are required to maintain data quality over time. Consider these strategies:

<b>Log Changes</b>	Track modifications to data to identify patterns of errors or inconsistencies that need to be addressed.
<b>Monitor Data Integration</b>	Regularly check that new data integrations and imports align with existing standards and prevent errors or discrepancies.
<b>Manage Duplicates</b>	Use automated tools to detect and merge duplicate records, ensuring that your database remains accurate and efficient. Enlist your member management system provider to help you with this.
<b>Provide Ongoing Staff Training</b>	Ensure your Data Wrangler — as well as other key staff — is well-trained and keeps up with the latest data governance best practices.
<b>Review Data Governance Policies</b>	Periodically revisit your policies to ensure they're keeping pace with changing needs and technologies.
<b>Utilize Data Validation</b>	Where appropriate, take advantage of tools to validate your data on an ongoing basis, such as standardized formats (another benefit of a member management system providing an SSoT).
<b>Leverage Automation</b>	Employ available tools to populate data gaps and identify potential issues.

## 07 Next Steps & Additional Resources

Data wrangling is an ongoing process that requires a long-term commitment to excellence. But, once you get your data clean, it's easy to keep it that way with the right plan. To continue improving your data practices, be sure to:

- ✓ **Foster a Data Culture:** Embed data stewardship into your organization's values, making it a core part of every team's responsibility
- ✓ **Leverage Technology:** Utilize modern tools that automate and streamline data management processes, improving accuracy and efficiency
- ✓ **Invest in Your People:** Equip everyone on your team with the knowledge and skills they need to manage and leverage data effectively — not just the Data Wrangler
- ✓ **Seek Expert Support:** Whether through a dedicated Data Wrangler, your member management system provider, or external consultants, ensure you have access to the expertise you need to keep your data sparkling

### *Expert Help: What to Look for*

Your member management system provider should be a resource to help guide leadership decision-making, digital transformation, and change management plans. Some providers have exceptionally skilled staff who can provide ongoing analysis and advice to help you enhance your operational effectiveness and value, reignite staff productivity, and ensure your organization achieves continuous performance improvement.

You'll want to look for a resource that can:

- ✓ **Conduct an operational assessment and workshop** to identify gaps and reveal opportunities to ensure optimal value from your system.
- ✓ **Design a team skills assessment and education plan** to measure your team's skill levels and create a customized plan to improve them
- ✓ Review your current technical setup, identify obstacles, and recommend changes **to align your environment with association best practices**
- ✓ **Create a performance improvement roadmap** that will help ensure you meet your top business and organizational goals

If you're considering new member management software as part of your organization's performance improvement strategy in the next 1-2 years, we've put together several resources that can help you now.

Or, if you're ready to get started now, [schedule a demo](#) of the iMIS Engagement Management System (EMS) that's purpose-built with all the features you need to effectively manage your organization — plus a powerful API with hundreds of proven integrations, easy to use dashboards and reports, and an optional web CMS. Powered by Microsoft Azure, iMIS provides automatic upgrades, world-class data security, and peak performance.



### eBook

Get insights on how to improve your performance by becoming a learning organization to achieve continuous performance improvement.

[imis.com/book](https://imis.com/book)



### Online Resources

Access a variety of resources to help you navigate your digital transformation journey from inception to evolution.

[imis.com/digitaltransformation](https://imis.com/digitaltransformation)



### Whitepaper

Establishing a Single Source of Truth (SSoT) is critical for creating highly personalized, engaging member experiences.

[imis.com/datasilos](https://imis.com/datasilos)

## About ASI, the Developers of iMIS®

Advanced Solutions International (ASI) is a leading global provider of cloud software and services for associations and non-profits. ASI helps clients digitally transform, streamline operations, and grow revenue through industry expertise, best-practice advice, and high-quality solutions. Its portfolio of solutions includes iMIS® for association and non-profit management, TopClass LMS for learning management, OpenWater for application and review management, and Clowder® for year-round mobile app management.



### **Need to Create Your Own Single Source of Data?**

iMIS is the only Engagement Management System (EMS) purpose-built for the way associations, unions, and non-profits work and designed at its core to improve your organization's membership performance.

▶ [Watch a 3-minute iMIS quick tour](#) to see how iMIS empowers you to learn from every member interaction — putting you on a clear path to continuous performance improvement and delivering better member value. [imis.com/quick-tour](https://imis.com/quick-tour)

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