



# Healthy Data Shop SCORECARD

**How to Use:** Put your data to the test by scoring each item from 1 (Early Stage) to 5 (Optimized). You are looking for clarity and consistency, not perfection.

## 1. Household & Relationship Integrity

**Healthy looks like:** Households are consistently linked, heads of household are clear, lifetime giving reflects reality, and it is easy to pull household and individual records (especially the head of household) separately.

**Watch point:** Inconsistent links lead to duplicate outreach, understated giving, and reporting friction.

1  2  3  4  5

## 2. Deduplication Discipline

**Healthy looks like:** Routine deduplication with clear ownership.

**Watch point:** Duplicates are addressed reactively, after they cause confusion or errors.

1  2  3  4  5

## 3. Core Field Completeness

**Healthy looks like:** Key fields (class year, constituent type, affiliation, moves stage) are consistently populated.

**Watch point:** Reporting requires manual cleanup or informal assumptions.

1  2  3  4  5

## 4. Free Text vs. Structured Data

**Healthy looks like:** Dropdowns and controlled values drive segmentation and reporting.

**Watch point:** Strategy lives in notes like “good prospect” or “check later.”

1  2  3  4  5

## 5. Next Step Discipline

**Healthy looks like:** Most active prospects have a clear, dated next step.

**Watch point:** Prospect lists grow, but defined actions do not.

1  2  3  4  5

## 6. Portfolio Size & Coverage

**Healthy looks like:** Portfolios are intentionally sized and reviewed regularly.

**Watch point:** Coverage is broad, but depth and follow-through are inconsistent.

1  2  3  4  5

## 7. Pipeline & Discovery Flow

**Healthy looks like:** A steady, tiered approach to discovery and qualification.

**Watch point:** Discovery happens in bursts, driven by urgency rather than plan.

1  2  3  4  5

## 8. Decision-Ready Reporting

**Healthy looks like:** Common questions are answered in minutes, not days.

**Watch point:** Teams pause to reconcile numbers before acting.

1  2  3  4  5

## 9. Dashboard Actionability

**Healthy looks like:** Dashboards clearly signal where to act or adjust.

**Watch point:** Dashboards are reviewed, but next actions are unclear.

1  2  3  4  5

## 10. Ownership, Training & Rhythm

**Healthy looks like:** Clear data ownership, light documentation, and regular review rhythms.

**Watch point:** Standards rely on individual knowledge and erode over time.

1  2  3  4  5

### The Litmus Test

If you can confidently answer **yes** to these, your data shop is healthy:

- Do we trust the numbers without reconciling them?
- Do we know the next best action for our top prospects?
- Do dashboards change what we do this week?
- If not, the opportunity is not new tools. It is tightening what you already have.

### Interpreting the Score

**40-50:** Decision Ready — Data supports prioritization and strategy.

**30-39:** Functional With Watch Points — Usable data, with specific areas to monitor and tighten.

**Below 30:** Early Stage Foundation — Focused improvements below the surface will unlock efficiency gains.