Stop the Export Madness:

Strategies for Increasing Security and Better Equipping Fundraisers than Giant Spreadsheets

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Do you care? What do you care about?

- Do you care about your constituents, your donors?
  - Their privacy
  - Their confidentiality
  - Protecting them from bad actors?

- Do you care about your organization?
  - Its reputation
  - Protecting it from financial risks
  - Protecting it from bad actors?

- Or do you just care about yourself, your job, just getting things done?

The agenda

- The issue
- The problem
  - Security
  - Poor data management
- The resolution
  - Culture change
  - Stay in the CRM
  - Extend the CRM
  - If you must export…
- Wrap-up, Q&A

The issue

- Constant requests for and answers with huge spreadsheets
  - Mailings, "reports," analysis, "lists"
- Not just spreadsheets, but also reports outside of reporting tools, such as emailed reports
  - E.g., I am strongly opposed to emailed daily gift reports for the same reasons we're about to discuss

FIRST NAME	LAST NAME	RELATIONSHIP	REQUESTED FREQUENCY	CURRENT LIFECYCLE PHASE	MOST RECENT GIFT			LAST CONTACT		NEXT POINT OF CONTACT		(YEAR) MAJOR GIFT ASKS			
					AMOUNT	DATE	WHAT/ HOW	NOTES	DATE	NEXT STEP	MEETING DATE	TARGET AMOUNT	TARGET DATE	TARGET PROJECT	FUNDS RECEIVED

The problem: 1.Security

- Files on laptops and computers

- Files all over every storage site

- Files in internal email

- Files on phones
  - E.g., how many of you ensure that a normally replaced phone is properly wiped, let alone have a policy and enforcement about users' lost and stolen phones?

- Files being emailed

1. A laptop is stolen every 53 seconds.

2. 86% of IT practitioners report that someone in their organization has had a laptop lost or stolen, 56% report that this resulted in data breach.

3. 65% of business managers record their password on a private document such as a post-it note or share it with other individuals.

4. 52% of business managers sometimes or often leave their laptop with a stranger when traveling.

5. 45% of healthcare information breaches occur on stolen laptops.

6. 5 Million: The number of medical patients' data compromised in a single case of a stolen laptop

https://medium.com/@opallockfidelityheight/shocking-laptop-security-statistics-51d0c10cde78

The problem: 2.Poor data management

- Data out of date
- Can't update data
- Can't drill through
- Excel
  - Excel format changes
  - Excel sorting challenges
- People who don't know how to analyze data
- Data shouldn't need to be reviewed or changed outside the system
- Spreadsheets that take on a life of their own

but in addition to staff education, I need to figure out how to lock down some of the new features, as people in the office are taking certain liberties to "help out" (changing contacts, adding data, running lists for reports that are incorrect...),

The resolution: Culture change

- Change in culture required about who uses the CRM
  - It's 2025: fundraisers should be using the *fundraising* CRM! Daily!
  - Related: requires change in culture about CRM training and support
- Change in culture and education about security practices
- Change in culture and training about data management "best practices"
  - E.g., set it up, fix it in the software, not in spreadsheets
- Change in data request and fulfillment practices
  - E.g., emails of "I need…" don't hack it anymore
- This includes your consulting partners, not just staff!

The resolution, Best: Stay in the CRM

The resolution, Better: Extend the CRM

- Power BI, Tableau, others
- On-screen vs. emailed vs. paper

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The resolution, Good: If you must export

- As few columns/fields as necessary
- As few records as necessary
- To one location only for all such files
- No one is allowed to move, copy, or email the files: work here only
- Have a strategy to smartly handle changes
- Only an authorized person is allowed to share outside the org
  - Proper security processes
- Records are marked inside the CRM
- Files are permanently *erased,* not just deleted

The resolution: Your CRM Security

- Ensure that only those users that truly should can export data

- Those users should get special training and constant reminders

- Perhaps even make them sign documents reminding them of the risks and responsibilities (confirm with management and perhaps HR)

- Restrict other users from exporting, but not from reporting, data, analysis, lists, etc.

Thank you! / Q&A

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