

# Foundation Audit

## Fresh insights and a solid basis for development

The starting point for successful strategic planning is to take stock of existing data structures, processes and resources – so you know where you are and what you need to do to get to where you want to be. We developed our Foundation Audit to provide a comprehensive, practical response to this need.

### Why conduct a Foundation Audit with Wood for Trees?

Wood for Trees has conducted Foundation Audits for more than 40 different clients, principally but not exclusively in the not-for profit sector. In each case the work has shed new light on existing working practices, structures and performance, and created an independent and accurate basis for future strategic development work and management reporting.

The principal benefits of commissioning a Foundation Audit include:

- The health check on the quality and integrity of addresses highlights any shortcomings in existing data sources
- We scope and identify key business drivers, so future analysis is more closely aligned to the business priorities and challenges faced by organisations
- We can benchmark where an organisation stands in relation to other charities, from a customer data point of view

Wood for Trees approaches every new project on its merits – we don't like one-size-fits-all solutions. Our Foundation Audit approach is a good example: it provides a framework for development, enabling us to identify and deliver information of greatest value to the client.

A common thread runs through every job we've ever done: the application of creative, outside-the-box thinking to cold hard facts. We're interested in the action our clients can take as a result of our work – how we can empower and enhance their decision-making.

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## How does a Foundation Audit work?

We do our best work when we know our way around an organisation, so we start by interviewing key data stakeholders, understanding what makes an organisation tick: looking at the data-flows, how they interact and what analysis has been carried out to date. The Foundation Audit – essentially a first pass analysis – would provide:

- A comprehensive review of the organisation's data structure, rules, definitions and how things are coded – for example how are different supporters and their relationships and products defined?
- A relationship matrix showing how the various stakeholder groups engage with the organisation
- A rigorous retention analysis which highlights key insights into the coverage and quality of the database, and the growth and retention status of the supporter base
- An overview analysis of LTV
- Geographic and demographic profiles of all supporters
- A single temporary data mart merged from all data silos, which would allow Wood for Trees to perform analysis across the entire supporter pool
- Option to provide Wood for Trees–designed analytical tools for further insight and planning guidance (see our strategic reporting tools card for more info.)

We also work on the data to ensure that subsequent analysis options and projects are meaningful, relevant and aligned with business needs. Our familiarity with all the main UK charity database systems, including Raiser's Edge, Care, Salesforce, helps us to deliver faster analysis with less preamble.

In total, the audit is a 'state of the nation' static report, providing invaluable groundwork for a future CRM strategy.

## Results that count

Two recent projects demonstrate the direct benefit on the bottom line that our work is capable of delivering.

### Major UK charity (1)

Reviewed existing data holdings and consequently improved data effectiveness. Provided bespoke tools with which to analyse performance and predictively model future performance. The client was able to generate an immediate fundraising improvement in the region of £100,000 in a very tough fundraising climate. Further financial benefits have accrued on subsequent campaigns, cascaded into wider parts of the organisation.

### Major UK charity (2)

The client sought to optimise data use in order to better inform communication strategy – with the ultimate objective of delivering a significant increase in net income. A Foundation Audit was the starting point and Wood for Trees devised a programme of strategies leading to:

- improved understanding of legacy supporters
- rapid delivery of a usable and effective consolidated database
- testing of new channels for recruitment effectiveness among less established supporter groups
- improve data categorisation through specified actions
- review of existing data culture with a view to breaking down boundaries



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