Lighthouse Process Guide 4: Keeping up to date on your data

Lighthouse's Dashboard & Actions give you some amazing tools to help keep on top of changes to data in Lighthouse.

By using them in combination, you can break down work keeping on top of these changes into manageable chunks, improve accountability within your local party and improve your data quality.

This process guide will take you through some ways that you can use our tools to manage this process and our recommendations on what to do. Of course, how you want to do this in practice is up to you!

Contents

Weekly / Daily changes

Recommended frequency: Daily

The Change Email feature on the dashboard allows you to get an email notification every day or every week, summarising the changes within Lighthouse.

This is intended as a quick jumping off point for checking overall changes in the system and to give you a pointer on who you might want to follow up.

We recommend that you sign up for the daily emails - as there's usually a relatively small number of changes and these can be easily handled in a few minutes, but in a smaller local party or if you have less time, the weekly email might be more appropriate.
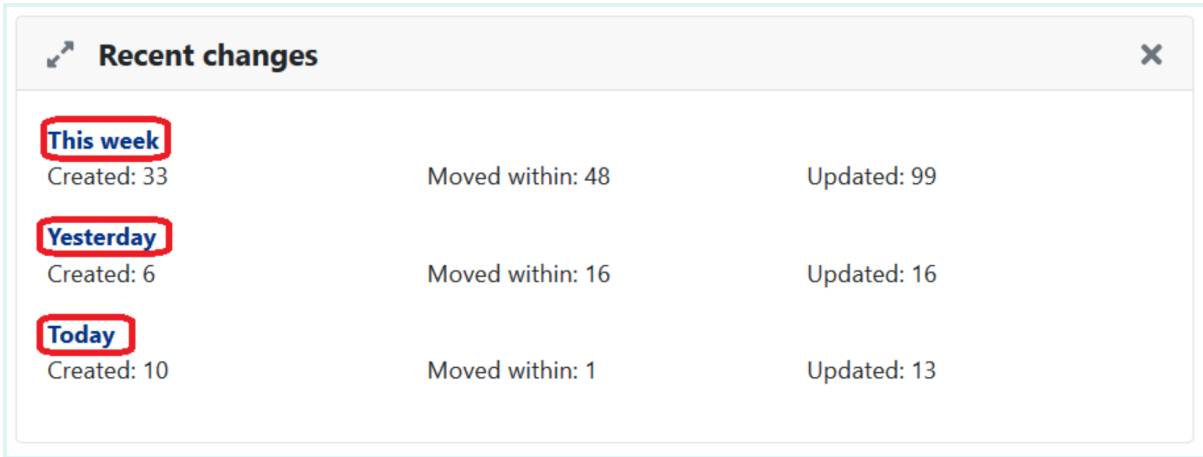
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Signing up for change emails

To set up the email alerts you need to start at the Dashboard. This will usually be the page you land on when you log in, but can be reached at any time by clicking the "home" icon.
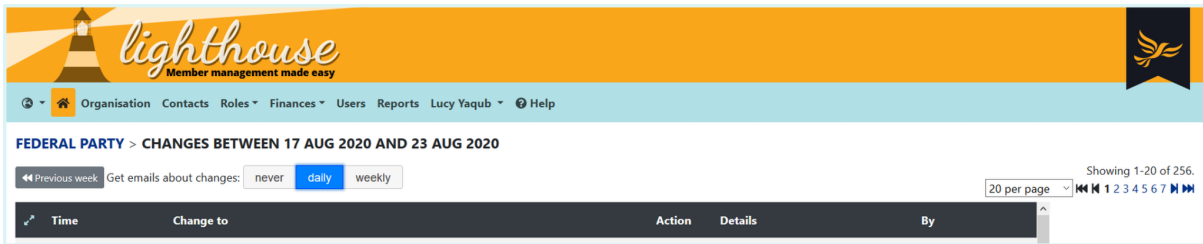
Once you're on the dashboard, scroll down to the "Recent changes" dashboard component, and click on one of the blue links.

Clicking this week, yesterday or today will take you to the recent changes page and display changes for the time period you selected.

On this page, you'll see a summary of all changes within the timeperiod selected and you'll also see an Action Button along the top labelled "Get emails about changes"

To start receiving up email alerts, click either "Daily" or "Weekly". If you select Daily, you'll get email notifications every day that there are changes, if you select Weekly, you'll get that weekly instead.

Daily alerts will usually arrive before 6am, whilst weekly ones will arrive each Monday morning.

The alerts look like this:

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Reviewing changes

Once you've signed up, you'll start getting alerts about changes in Lighthouse. These will come through on the frequency you've selected and won't be sent if there are no changes to report.

The email contains a link that takes you to the Recent Changes section of Lighthouse, which looks like this:

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You'll see here, that this local party has had two changes this week (this is a pretty normal number of changes!) - they've had one new record created and another record updated. Taking you through the screenshot, here's what it all means:

- **Time** allows you to see when the change was made.
- **Change to** is the record that was changed. The icon shows you the record type (and hovering over it will give you more information on the type). Clicking on the double arrow will take you to the changed record. It will also say the person's name next to it, but this has been redacted.
- **Action** is the type of change that was made. Common actions include:
  - Created - indicates that a new record has been created
  - Updated - indicates that a record has been updated
  - Lapsed - indicates that a former member has lapsed
  - Resigned - indicates that a former member has resigned
  - Deceased - indicates that a contact has died
  - Moved - indicates that a contact has moved. It will tell you whether this is in to, out of or within your organisation.
- **Details** includes more information on the changes that have been made
- **By** tells you who made the change. Salesforce means it was made by HQ and if it was made by a Lighthouse user, their name will appear.

On the left hand side, you'll also see a checkbox. This allows you to select multiple changes and then create an action for them - this will come in handy in the next section!

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Next steps

We're now getting notified of changes in our membership and can understand them in the system. Our next step is to decide what, if any, action we need to take as a result of the changes that we've had reported to us.

Setting up Actions

As we mentioned in the last section, from the recent changes screen, it's possible to create actions in bulk to follow up on changes.

Actions are a feature in Lighthouse that allow you to track work and its completion. We're assuming here that you're taking a few minutes each day to check in and create actions and then finding a larger block of time to come back and follow them up.

If you've got more time available to you, you might be able just to take these actions live and might not want to use actions as a reminder.

In this example, a local party has had three contacts marked as deceased as a result of contact to HQ:

The local party officer has selected all three records by selecting the checkbox in the left hand column.

You'll also see that the "Add action" button has changed colour - from a light blue to a deeper teal

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FEDERAL PARTY > CHANGES BETWEEN 28 MAR 2022 AND 3 APR 2022

◀◀ Previous week | ⏰ Add action | Get emails about changes: | never | daily | weekly

If we now click add action, that will bring up a dialog box that will allow you to create one action for all of these contacts.

[You can find out more about creating actions here](#).

Once an action has been created, you can update the action to record the work you've done, mark it as complete (or incomplete). You might also want to report the work you've been doing, as described in your Actions as part of an executive report.

Following up changes

Now that we know how to take an action and have (hopefully) learned more about actions and how we can use them, we want to talk more about some of the actions we might want to take as a result of things being reported in recent changes.

For all records, created, updated or moved you want to:

- Check that the contact isn't a duplicate of an existing record
  - The easiest way to do this is to search for their surname or postcode in Lighthouse

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- - If you spot a duplicate, submit a problem report and ask HQ to merge them for you.
- Check that they're assigned to the relevant branches (if your local party uses branches)
  - You can find out more about managing branches here.

New members / supporters

A new member or supporter is always cause for celebration and we all want them to get a great onboarding experience!

As outlined in the Boost Guide, best practice is to call or visit a new member or supporter to welcome them to the party within 2 weeks. Setting up an action for this is a great way to make sure that happens.

What we recommend is creating an action with a target date 2 weeks in the future, along with useful instructions on how to make the call - and make sure you remind people to log it on Connect!

You also want to do a couple of other things for your new member:

- Make sure that they've been added to Connect MyCampaign
  - You can find out more about this in Process Guide 3.
- Make sure that their email address has been added to your email tool (if you can email them)
- If they're a supporter, try and complete their address based on the electoral roll
  - We only collect postcodes from supporters on signup - to make it easier and faster to sign up.
  - But by using quick look up in MyVoters and searching based on last name and postcode, the full address can often be identified. Filling this in improves our data and our match rate to Connect.

Lapsed / Resigned members

Members leave - and that's absolutely fine! Being a Liberal Democrat isn't for everyone. But if we can make sure that people have a good exit experience (as well as a joining one) then they're more likely to re-join us in the future.

For members who lapse or renew, we recommend reaching out either by email or by phone to check if they'd still like to hear from the party locally / be invited to events, or if they'd prefer not to hear from us.

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To manage this followup, we recommend creating an action, along with useful instructions on what to talk about in the call.

After that conversation you should get a sense of how final that departure is and if there might be a way to win them back in the future.

If you think it's possible that they might come back, we'd recommend creating an action to follow up with them 3-6 months later.

If after that conversation you're certain that the departure is pretty final you may want to make a few other changes - based on what they've said, including:

- Removing them from your email tool (if they don't want to get emails)
- Removing them from party systems - like Connect - if they had access
- Removing them as MyActivist in Connect MyCampaign

Deceased members

The processes we have for managing deceased members and ensuring they don't get communications after we've been notified of their death are detailed in their own [Geek Sheet](#) and whilst a lot of the necessary steps are taken care of automatically, there's a few things that you might want to do, after seeing a deceased member in recent changes:

- Remove them from your email tool (Nationbuilder, Prater Raines or Mailchimp).
- Make sure that they're also marked as deceased on Connect in both MyCampaign & MyVoters.
- Send their relatives a condolence letter or flowers on behalf of the party.

Moved members

Members move around the country all the time - just like real people! Of course, Lighthouse doesn't have a live feed for when people move. We only know when someone updates their address - specifically, their postcode.

There's a process in Lighthouse that looks up the local party and electoral area when the postcode field is updated - so any postcode update will trigger it and could trigger a move.

This is an important thing to remember - as you may get "moved" members here who have not moved house, they just changed their postcode in a website interaction with us (which can be by accident!).

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There's a few scenarios for moved in members we want to run through here to give you a sense of how best to deal with them.

Record moved in from Unallocated Local Party

"Unallocated Local Party" is a holding pool for people who have incomplete or invalid postcodes - as we can't assign them to a local party, we keep them there until the postcode is updated.

A record who "moves in" from Unallocated is unlikely to have moved to your area, but will have interacted with the party online recently and have provided a postcode when doing so.

It makes sense to try and follow this record up, if possible, because this is a good indicator that someone might be open to getting more involved in the party. As a result, you might want to create an action to contact the person and talk to them about joining or volunteering.

Record moved out to Unallocated Local Party

This is quite rare, but can happen. In this case, the person has updated their own postcode in such a way that it can't be recognised - for this, drop an email to support@libdems.org.uk and we'll be happy to help.

Record moved in to your local party

With a record that's showing as moved in to your local party you should do two things. First is double check that they aren't a duplicate. We talked about the process for doing that in new members / supporters.

If they are a duplicate of an existing record, then report them to HQ using a problem report.

If not, then the best thing to do is reach out and get in touch with them. When doing that, you probably want to hedge your bets a bit - don't say "welcome to the area" say "If you're new to AREA, welcome!" as you're less likely to offend someone!

For a first interaction, you want to try and avoid asking them straight out to volunteer by delivering leaflets - invite them to an upcoming social event as that's always going to be an easier way in!

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To track that followup and the result of the conversation, we recommend using an action, if you're a Data Officer, you might want to create an action for the Membership Officer to follow up, rather than following up yourself.

Using actions also allows you to report your workload more accurately to your exec and gives you a comprehensive list of the outreach work that you've been doing.

Member / supporter moved out of your local party

As with moved in member & supporters, sometimes a member moves because they've accidentally entered their postcode, or they may genuinely have moved.

Either way, we recommend that someone from the local party reaches out to wish them the best in their new area and to check if they want to be removed from local databases.

Sometimes, people will move but want to stay involved in your area, or keep up to date with what's going on - so it's worth offering.

As with the moved in records, we recommend that you create an action to track the follow-up from the move out.

Member moved within your local party

For members moving within your local party, you again want to get in touch with them to check in. You'll also want to check if:

- They need to move branches
- They're currently doing any volunteering activity (like leaflet delivery) that might need to be updated

New donations

For every donation, it's important that donors get a thank you and understand the difference they made. This can obviously take different form depending on the size of a donation, but in an ideal world, each time you get a new donation, you're creating an action to follow up and thank that donor, by email, post or phone.

Your local party should set policies for what level of donation gets what level of thank you and from whom - most donations a personalised email is sufficient, for larger donations you might want to upgrade that to a phone call, or even a letter.

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Newly created contacts

Lastly, you'll get newly created contacts showing on the dashboard that aren't members or supporters. There'll be a few sources for these, but generally, they'll have information on a campaign they've signed up for, a donation they've made or a role they've tried to access.

As well as doing the standard steps, you also want to make a decision about if this is someone you want to prioritise for canvassing.

As outlined in the Boost Guide, people who sign online petitions are likely to vote for us and a great source of volunteers, members and supporters.

One consideration to make is if we have any other data on the person - if they're showing as no data in Connect, then they definitely need to be a priority for canvassing in the near future. If we already know they're a LibDem, then it might well be time for a quick phone call (if you can call them!).

Reviewing data check filters

Recommended frequency: Monthly/Quarterly

Records with incomplete addresses

There are two filters to check for this - and if you're pressed for time, it's worth focusing on just the ones in Members & Supporters, of which there will be fewer. The reports are: Data Cleanup 🧹: Members & Supporters with incomplete addresses & Data Cleanup 🧹: non-members with incomplete addresses.

These reports give you all records with partial or incomplete address information on the system.

This is defined as having a postcode, but no address or city.

To complete the address, all you need to do is look up the record using the details provided in Lighthouse in Connect MyVoters. Where you can locate the address information from the electoral roll, you then just need to update it on Lighthouse ([find out how here](#)).

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Gone-away members

"Gone-away" members are members who we have an address for, but where mail has been returned, either to the local party or to HQ and they have been marked as gone away.

These records are automatically sent an email asking them to update their address, but it's also worth a local party following up too - because that will often get better results.

The easiest way to contact them is by email, in which you can include a customised URL that allows them to update their own address.

For people who don't respond to that email, we recommend a followup call.

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