Validate

...for a customer database that's always up to date

Do you need to:

- **Be confident that your database is accurate and ready to use?**
- **Make sure your members are paying the right rates?**
- **Identify lost and missing revenue?**
- **Manage data entry performance across multiple sites?**

Validate is an advanced software solution which enables you to keep your membership database accurate and up to date. There's no need for an expensive and time-consuming annual audit, Validate checks the live data every day and emails you to let you know what needs fixing. This enables you to keep customer records accurate and ready to use whenever you need to. But more than that, it's also a fantastic tool for your finance team to find things like unexplained refunds, non-payers, missing bank details and much more.

Key benefits:

- Brings together information from different sources and multiple sites to give you full visibility
- Replaces outdated annual clean-ups – your database is always up to date
- Runs in the background – you decide when to action it and who to direct the issues to
- Totally flexible – one solution meets the needs of marketing, finance, managers and administrators
- Reduces customer complaints from inaccurately keyed contact information
- Make sure membership rules are applied consistently
- Enables you to comply with the Data Protection Act

FAQs:

How does it work?
Validate enables you to search your customer database for issues and anomalies. So, for example, you could look for errors in your customer's personal information and, if you have a lot of over-18s still being called Master, you'll be able to dig out and repair their records much faster than you could do it manually.

Validate isn't only used for communicating with members. Because the system is so versatile, you can search for a whole range of errors and it can be used by the marketing, administration and finance teams.

We have already identified the most common queries (six of which will be pre-loaded into the system for you) but Validate can be programmed to search for any issue that you are concerned about.

What happens when an issue has been identified?
Validate collates the information and creates a series of reports relevant to different parts of the business and to different sites. The reports are formatted as a PDF and emailed to the relevant person ready to be worked on. Each team sees only the errors they need to.
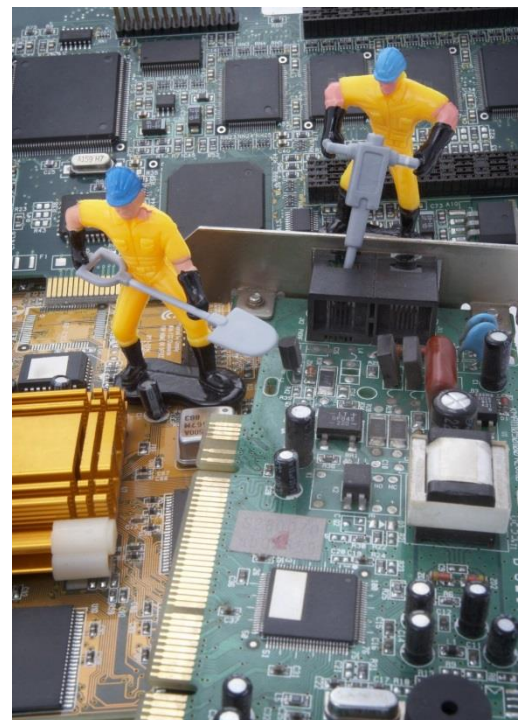
What if we don't have time to action all the errors that Validate finds?
No problem. It is up to you how to prioritise and action the errors so if you don't have time to fix keying errors immediately they will be carried over to the following report. It's an in-house system so you always stay in control.

How can Validate be used to find lost revenue?
Validate can be set up to check that membership rules are being followed consistently. So, for example, you could dig through the data to see whether any adults are still paying junior membership rates or if you have any joint memberships where one person has left and the remaining partner is only being charged 50% of the joint amount rather than the full single rate.

These types of errors can add up to a significant amount of revenue and would normally be extremely difficult to find. You can also investigate financial irregularities such as large refunds that could indicate internal fraud or just make sure that unpaid bookings are chased up.

How can I make sure I don't have so many keying errors in future?
Validate can identify where keying mistakes are being made – right down to an individual level - so you can target training exactly where it is needed most.

How secure is the system?
Each user will have access to the information you want them to see and nothing else. The system administrator can check and update these permissions whenever they need to.

Our database is a non-standard layout, will Validate still work?
Validate can use any set of data so don't worry if it's an usual format or if you need to feed in information from other management systems (like an accounting package, for example), just let us know and we'll make the necessary adjustments.

How do I write the queries?
We will work with you to identify the most important issues in your business and set up the first six queries for you. If you want to write subsequent multi-level queries yourself you can (it does require technical knowledge), otherwise we can do it for you.

Can Validate correct the errors for me?
Yes, with additional development work to integrate the system with your database some of the errors can be corrected automatically. Give us a call and tell us what you need.

How do I get started?
We provide face to face training at a venue of your choice to help you set up and get the best out of the system. We also run a series of seminars and workshops across the UK each year to share new ideas. Further training to meet your specific needs is always available.

How much does Validate cost?
There is an initial set up charge which includes your first six queries and training to use the system plus an annual license fee. Any member of your team can use the system once it's up and running. Please contact us for the current licencing and payment options to suit your needs. To find out more, please email contact-us@cascade3d.com or call 0844 7365227 (Option 2). We look forward to hearing from you soon.