



SaND AI Data-to-Storytelling Checklist

A SIMPLE, SEVEN-STEP GUIDE TO TURN DATA INTO CLEAR, COMPELLING STORIES.

Use this checklist to ensure your organization moves from collecting information → to understanding it → to communicating impact with confidence.



DATA CREATION

Collect What Matters Most

Make sure your data collection tools capture the information your mission actually needs.

Checklist:

- Do we know the 3–5 key metrics that matter most?
- Are our forms/surveys simple and consistent?
- Are we tracking core activities (sign-ups, attendance, donations, hours)?
- Do staff and volunteers know exactly what to collect?
- Are templates prepared and easy to use?

DATA AGGREGATION

Bring All Your Information Together

Stop juggling spreadsheets. Create one unified place to store everything.

Checklist:

- Are all data sources listed and mapped?
- Do we have a single “data hub” or central file?
- Is fundraising data connected?
- Is program data connected?
- Does leadership have access to the same information?

DATA PROCESSING

Clean & Organize

Make sure your numbers are accurate, consistent, and ready for reporting.

Checklist:

- Are duplicates removed?
- Are names, dates, and categories standardized?
- Do totals match across all sources?
- Is the dataset complete (no missing fields)?
- Are we confident the data is trustworthy?

DATA STORAGE

Keep It Safe & Accessible

Secure storage ensures your data is protected and always within reach.

Checklist:

Is all data stored securely (cloud or local)?	Is everything backed up automatically?	Do staff have the right level of access?
Are password and security protocols in place?	Is the system easy to navigate?	

DATA MANAGEMENT

Protect Privacy & Stay Compliant

Handle sensitive information responsibly and follow required rules.

Checklist:

- Are data-sharing permissions clearly defined?
- Do we follow HIPAA/FERPA (when required)?
- Are privacy policies easy to understand?
- Are privacy policies easy to understand?
- Are we limiting access to only those who need it?
- Do we have a process for reporting or correcting errors?

DATA ANALYTICS & VISUALIZATION

See What's Working

Turn numbers into insights through dashboards and visuals.

Checklist:

- Do we have dashboards showing key trends?
- Can we see attendance, engagement, and outcomes at a glance?
- Can leaders make decisions quickly using visuals?
- Do the visuals match what funders want to see?
- Have we identified strengths, gaps, or opportunities?

DATA COMMUNICATION & STORYTELLING

Share Your Impact With Confidence

Bring your results to life through clear stories, visuals, and reports.

Checklist:

- Do we translate data into plain-language stories?
- Do we have one-pagers or infographics ready for funders?
- Are reports clear, visual, and easy to understand?
- Do we highlight success, challenges, and next steps?
- Are our impact stories aligned with our mission?



FINAL TIP

Data becomes powerful only when it's communicated clearly.

Use this checklist regularly to keep your team aligned and your outcomes easy to understand.

WANT HELP IMPROVING YOUR DATA OR STORYTELLING?

Book a Free BI Discovery Call
— we'll walk you through the first steps, no jargon, no pressure.

