Six Steps to Record Keeping

1. Identification
   1. Identify what information you’ll need/want to track. There’s going to be lots. Sometimes we don’t know until it’s too late, make a plan for next time.
2. Collection of the information. Lots of methods. I like having templates/systems set up to remind/expedite.
   1. For customer info Everdale uses paid software. Database versus excel.
   2. For production and sales data, we use physical print outs that will have to be manually entered at a later date.
3. Storage. Once collected, data must be stored.
   1. If physical, will you store the actual records and enter them into an electronic system?
4. Organization or compiling.
   1. For physical records, sometimes it’s putting sheets in chronological order in a file folder to be looked at later.
   2. Using software might mean some of this work is done for you.
5. Analysis. This is why you collect data!
   1. Helps Everdale improve production practices and ensures we don’t duplicate mistakes.
   2. Our customer tracking software allows for powerful analysis.
6. Decision making.
   1. Analysed data should yield answers to help make decisions.
   2. Example: Only 60% of our CSA members signed up again. Why?
   3. Example: Our bed of kale yielded less per bed foot than we thought. Why?
   4. Example: We thought we could wholesale 40 bunches of radish a week but couldn’t and ended up with extra crop. Why?