

# Data Minimalism in Theory and in Practice

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# Agenda

1. Why are we here? Why does this matter?
2. Core Principles
3. Why minimalism is hard
4. Quick Poll
5. Five-question framework for discernment
6. Practical tools
7. Case studies
8. How to do this in real life

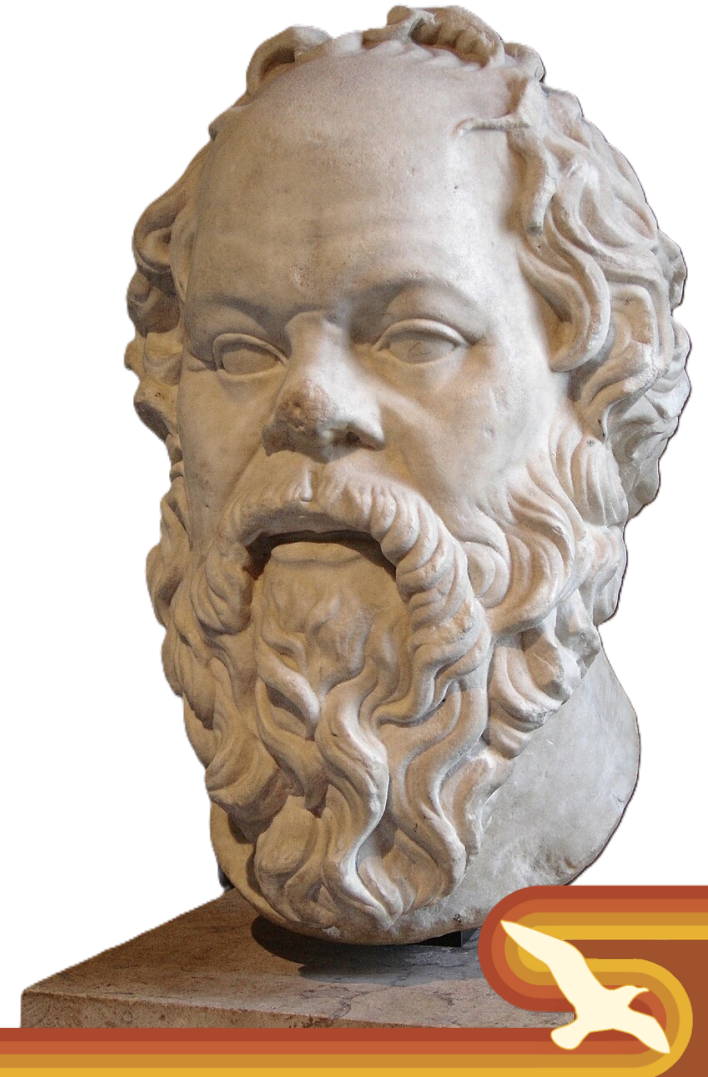


# Existential Questions

Why are we here?

Why does this matter?

- AI, wealth screening, and integrated CRMs increase capability and risk
- Many organizations lack retention standards and governance
- Data minimalism is now an operational issue



# Core Principles

Why are we here?

Why does this matter?

**1**

Collect  
intentionally

**2**

Retain  
purposefully

**3**

Share  
responsibility

**4**

Limit unnecessary  
exposure



# Why is this so hard?

## Structural Barriers

- Inherited systems
- Institutional inertia
- Fragmented governance
- Limited authority

## Cultural Barriers

- Rewarding comprehensiveness
- Fear of omission
- Emotional institutional memory

## Technical Barriers

- Replication is easy
- Integrations multiply exposure
- AI reduces friction to over-document



# Temperature Check

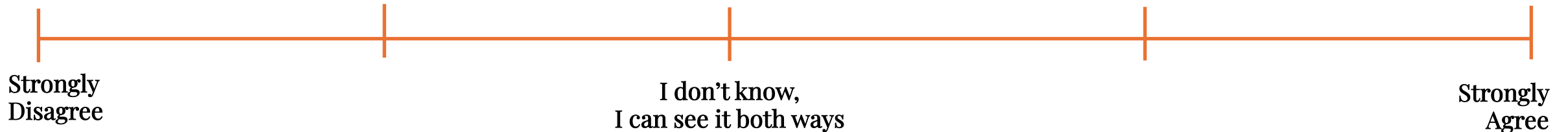
Operationally necessary?

Contextually useful but high risk?

Better suited for verbal transmission?

Not appropriate to retain?

This scenario makes me uncomfortable!



# Rumored family conflict affecting solicitation strategy



# Board member concern about a prospect's reputation



# Political giving patterns pulled from public records



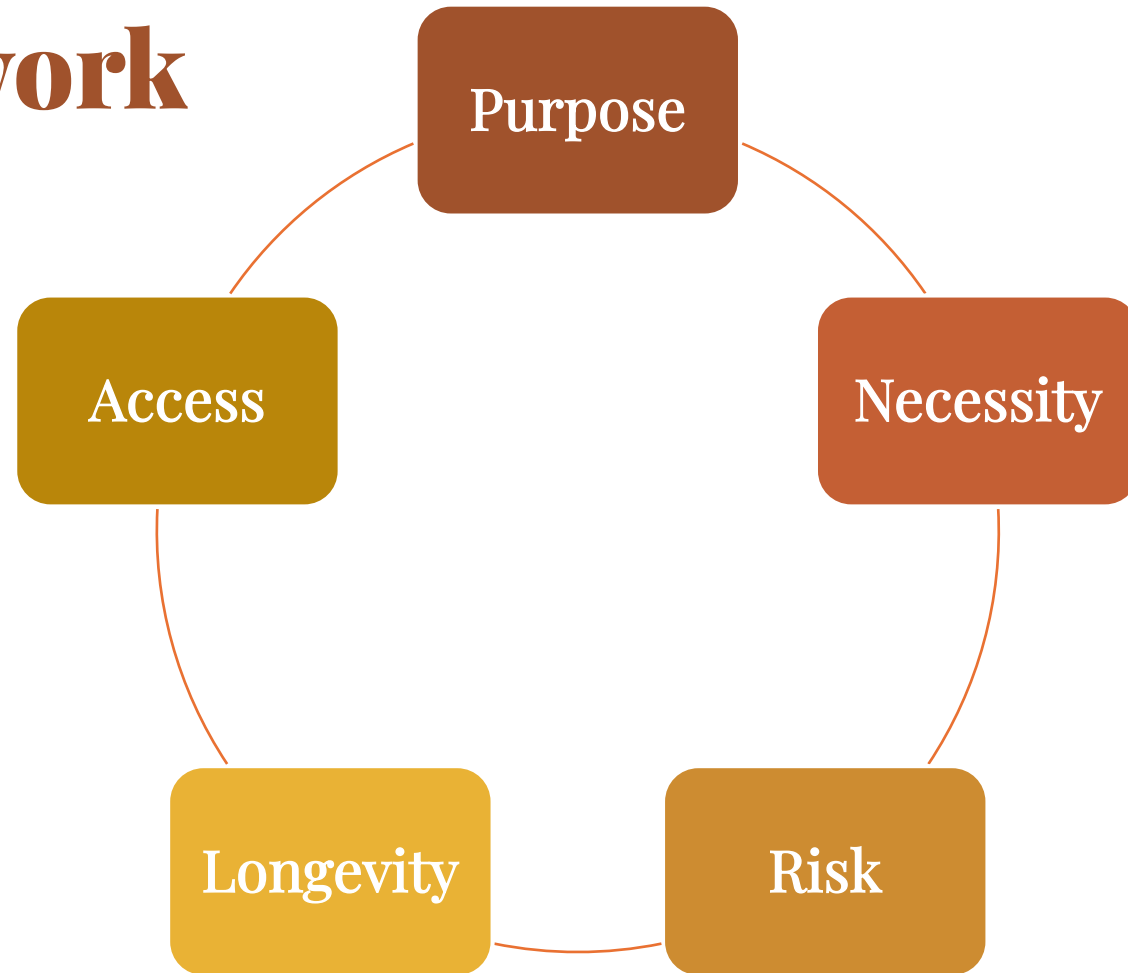
# A wealth screening confidence score with unclear sourcing



# Notes from a gift officer conversation about a prospect's health



# 5 Question Framework



# Practical Tools

Do you have any of these? If not, start here:

- Research note classification standards
- “Minimum necessary” documentation guidance
- Restricted-access research categories
- CRM field governance practices
- Research, retention, and/or archival standards
- AI usage guardrails for prospect development



# **Case Study A**

## **Wealth Screening Overload**



# **Case Study B**

## **Sensitive Research Notes**



# Case Study C

## AI-Generated Summaries

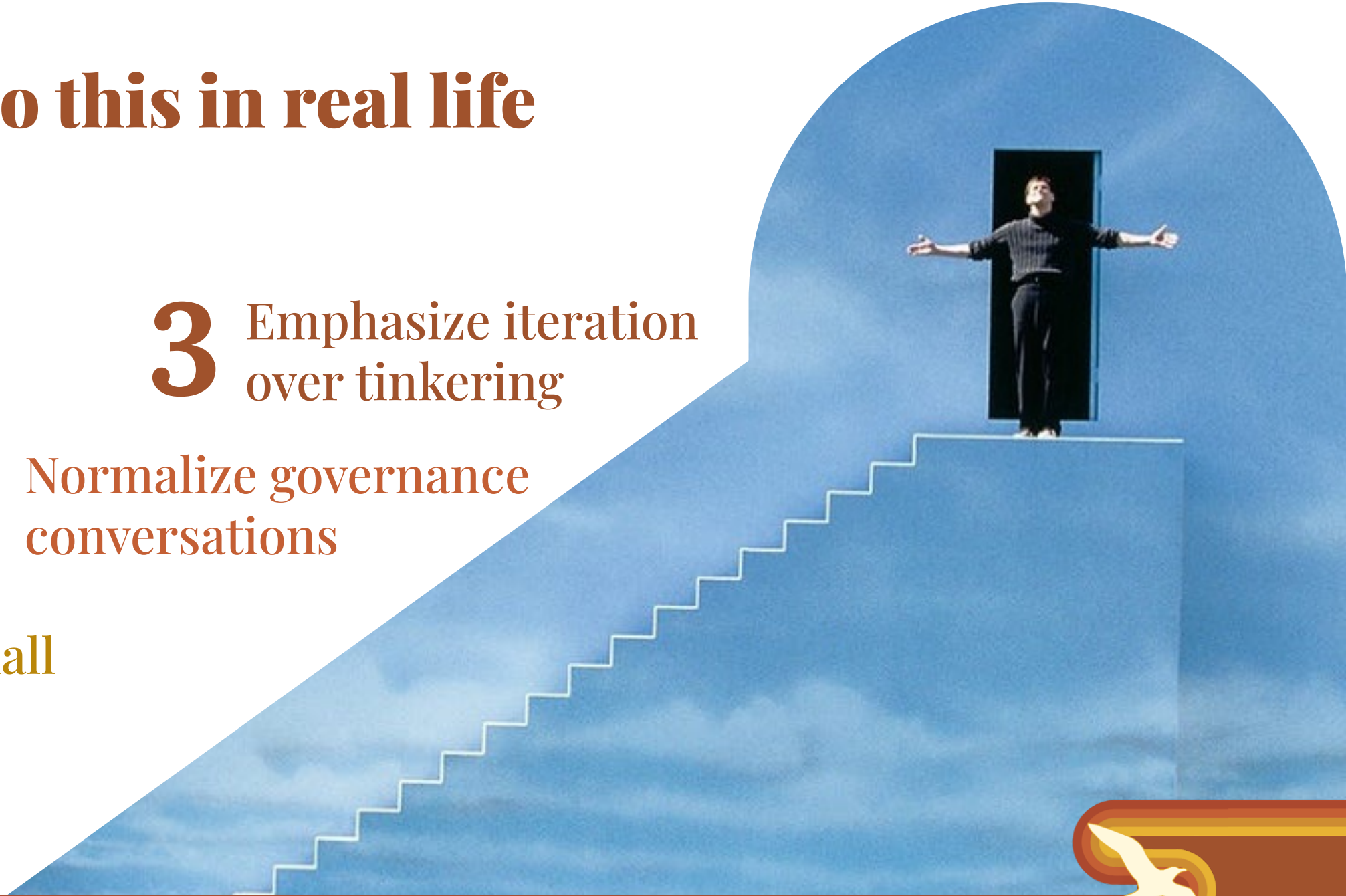


# How to do this in real life

**3** Emphasize iteration  
over tinkering

**2** Normalize governance  
conversations

**1** Start small



# Final Takeaways



- + More intentional
- + More defensible
- + More disciplined
- + More trustworthy

**Judgment is our value**