

10 Steps to a Single Customer View

An Experian QAS White Paper



Maintaining a Single View

All organizations strive to achieve a single customer view, but most organizations fall short of this goal. The benefits are clear; by linking customer data across department databases and business units, an organization improves business intelligence, customer profiling, and customer management.

Whether data cleanup originates from a business merger, a migration project, a de-duping effort, or a CRM/ERP implementation, the work is similar. Data stewards first need perspective from commercial stakeholders, an understanding of the data impacts, and a clear process that takes technology and methodology into account.

This resource outlines 10 steps that help data stewards improve the quality of customer contact data, including physical mail, email, and telephone information. Material is based on experiences with B2B and B2C organizations working through migration, de-duping, merging, validation, and standardization projects.

Step 1: engage stakeholders

Data stewards are not mind readers. They work with finite data and rely on business stakeholders to provide insight. Similarly, business stakeholders may not understand the intricacies related to data management and migration projects.

With this in mind, remember to engage users across departments and functions. Each individual brings a unique perspective and list of priorities. More importantly, each person understands the ramifications of change to his or her department.

Engagement sets the stage for change and helps identify key

stakeholders. It's best to start with a larger group to communicate the upcoming project and gain basic feedback.

From there, refine the group to core contributors, those individuals most impacted or those with the most information on data collection and usage patterns.

Step 2: review the data spider

Review data collection channels and business process stages with the finalized stakeholder group. The objective is to understand how data flows throughout the business. By constructing a data spider (or data workflow), organizations visualize

their setup and identify error patterns and business impacts.

Consider these sample questions:

- What types of data are entered?
- Where are data errors prevalent?
- What prevents better data entry?
- Which departments share data (and how do they share it)?

Step 3: identify patterns and impacts

By following data collection and usage, error patterns become evident. These errors prevent data stewards from amalgamating records and defining a master customer database. Additionally, commercial pains highlight issues related to segmented or duplicated data.

It's likely that multiple data issues will be identified during this stage. Remember to prioritize cleanup projects based on the significance of the business impact (and also the timeline to implement and see results).

Determine the main business pains and trace them back to their root data causes. For example, do call center representatives type information incorrectly? Or do sales representatives enter incomplete information, such as a partial street address? The type of error is important, as each type requires a unique solution.

Step 4: create success criteria

Look for quantifiable metrics related to data errors or duplicates.

Consider these sample questions:

- What benchmarks exist (example: orders misrouted, customers response rate or dollars lost)?
- How would better data impact each benchmark?
- How will you track results?
- What constitutes as success for this project?

Once success criteria are set, review the project scope. What core contact data needs to be improved in order to achieve results?

Step 5: define new standards

Define standards for entering and maintaining core contact data across the company. Core contact data refers to data that can be used to identify or match records.

By standardizing contact data, administrators more easily track

and identify records. This is done by grouping records based on the standardized information (also known as unique identifiers). These unique identifiers enable better comparison and matching.

Step 6: validate and standardize data

Once data standards are set, leverage contact validation software to clean existing address, email, and telephone records. The ideal tool validates and automatically standardizes records based on authoritative reference data, such as the USPS®.

By cleaning existing records in bulk, data stewards improve matching results. Additionally, back-end validation tools refine the work associated with updating incomplete and invalid records.

Step 7: leverage matching technology

There are two types of matching technologies. Both types produce better match results when administrators input accurate and standardized data.

The first type matches data extracts against a reference file (such as the USPS® National Change of Address File). In this situation, the software vendor updates existing customer records. Organizations leverage this functionality to ensure that data does not become outdated.

The second type matches multiple internal data extracts. In this situation, the software vendor helps identify records with similar or exact attributes. Organizations leverage this functionality to create a master customer record.

The ideal vendor has access to fuzzy matching technology to better identify potential matches. An example of this would be recognizing the similarity between Jon and John.

Step 8: refine and review results

Most software tools provide matching scores to articulate confidence levels. It's up to the data steward to set guidelines around these results.

For example, many organizations automatically accept matches that receive high confidence levels. This reduces the amount of manual review required to complete a de-duping project.

Step 9: implement proactive tools

Select a software tool that proactively verifies and standardizes contact data at the point of capture. The ideal solution works seamlessly throughout call centers, sales departments, customer facing websites, and any other inbound channel.

Additionally, the tool should interact in real time. This means that it verifies the captured contact information immediately, while a customer is still available to update the data, if necessary.

Staff members are empowered with this technology. When data is entered incorrectly or without important details, the user is prompted for the missing elements (such as an apartment number). And by validating and standardizing new information upon receipt, the business easily complies with company data standards and ensures that customer records are entered correctly.

Step 10: run regular data checkups

Create a maintenance plan and schedule sporadic data checkups to prevent data decay. Depending on the business and customer base, the schedule will vary.

During these checks, ensure that data has not expired (and refresh expired data as necessary). In addition, check for duplicates.

Maintaining a holistic view is an ongoing process. Data continues to change and it's important to continue to review, match, and merge.

Conclusion

Organizations have historically relied heavily on manual processes because of supposed cost savings and IT resource constraints. Unfortunately, manual error impedes business

processes. In order to achieve business success, seek out new tools and processes.

Leverage technology that makes your job easier. These steps offer guidelines for creating and maintaining a single customer view. With this, organizations make data accessible to all and improve results across the business.

Customer Spotlight:

How a manufacturer realigned its sales force and reorganized its supply chain.

Situation

A manufacturing company sells multiple products to end-consumers and small businesses. That company purchased one of its competitors, creating challenges related to integrating customer data across SAP, Siebel, and JD Edwards.

Main issues:

1. Sales needed to represent all products (instead of having multiple people calling into the same account).
2. With orders now placed across multiple systems, the company worried that customer satisfaction would decrease and fulfillment would become disorganized.

Solution

The company standardized address records across all data sources using Experian QAS address verification software and services. The standardized address acts as a simple and indisputable reference point to begin matching records.

The company found address matches for 91% of records, with 64% categorized as high matches. High match results were reviewed and verified first, providing quick wins for the data integration project.

Most of the project, however, was spent reviewing low match results (27% of the database) and no match results (9% of the database). These records were not complete and therefore could not be standardized for matching across databases.

Results

The company saved time on what would have been a very manual identification and matching process. Moreover, a single customer view, achieved by creating a one-to-one match across multiple customer data sources, allows the company to improve customer interactions and to streamline business processes.

Quick results:

1. 91% of addresses were normalized automatically, refining the search for bad records and reducing manual rework.
2. Distribution changes have gone smoothly.
3. Customers are easily identified and orders are taken and processed, all without impact to the customer.

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