Migrating to a Unified Customer View

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What is a Unified View

- **The Holy Grail**
  - Single instance of each customer
  - All aspects of interactions with customer
  - Shared by all parts of business e.g.
    - Sales
    - Billing
    - Customer service
    - Shipping….

Challenges

- **Consolidating Customers from multiple systems**
  - Unique ID across systems
  - Identifying duplicate organizations
  - Identifying duplicate addresses
  - Identifying similar/same addresses
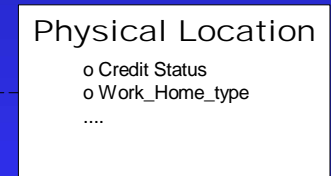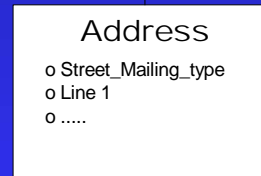 - Identifying duplicate contacts
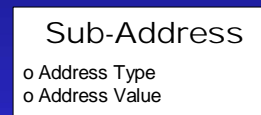
Issues and Approaches – Unique ID

- **Uniquely Identifying customers across systems**
- **Fuzzy matching utilities**
- **Where to store new unique id?**
  - In existing system tables with new columns
  - Cross-reference tables
- **One-time load or on-going?**
  - Maintaining cross references
  - Assigning new unique ids

Issues and Approaches - Addresses

- **Duplicate Addresses**
  - ◆ Do we really care? Measure of time/effort
  - ◆ Address cleanup utilities
  - ◆ Single instance of address or repeats ok?
    - ◆ Corporate Campus addresses
    - ◆ Suites or Floors
  - ◆ Multiple Addresses vs Physical Location
    - ◆ Street or Mailing (PO Box) address
    - ◆ Work, Home or other purpose?

Suite
Floor
Building

Sub-Address

o Address Type
o Address Value

Address

o Street_Mailing_type
o Line 1
o .....

Physical Location

o Credit Status
o Work_Home_type
....

Issues and Approaches - Contacts

- Uniquely identifying contacts
    - Within organization
    - At a location
    - Using direct telephone numbers
- Fuzzy name matching tools
- Where to store the new ID?
    - Cross-reference table
    - Additional data in existing systems

Party Location
o From Date
o To Date
o Room_MailStop
...

Individual

Sub-Address
o Address Type
o Address Value

Suite
Floor
Building

Organization

Address
o Street_Mailing_type
o Line 1
o .....

Physical Location
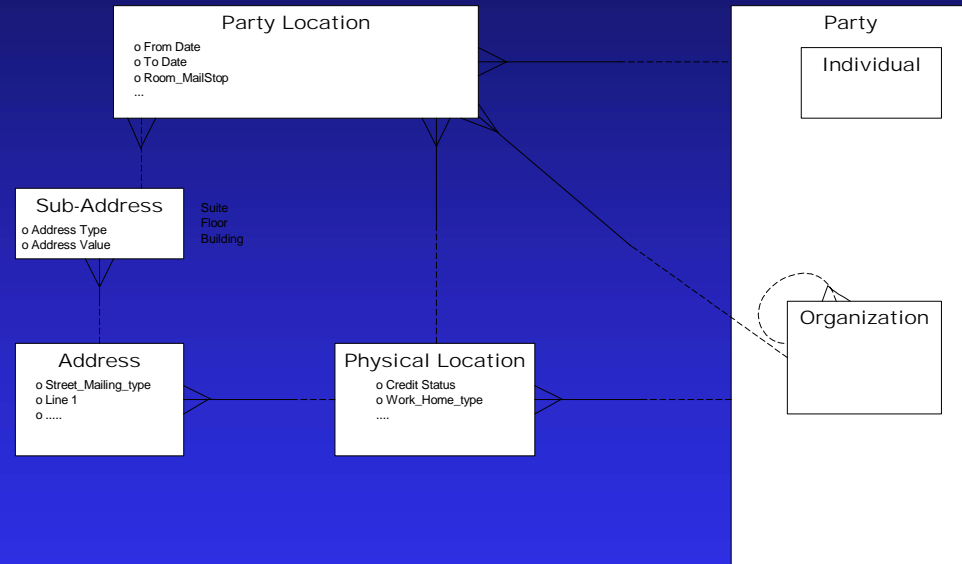o Credit Status
o Work_Home_type
....
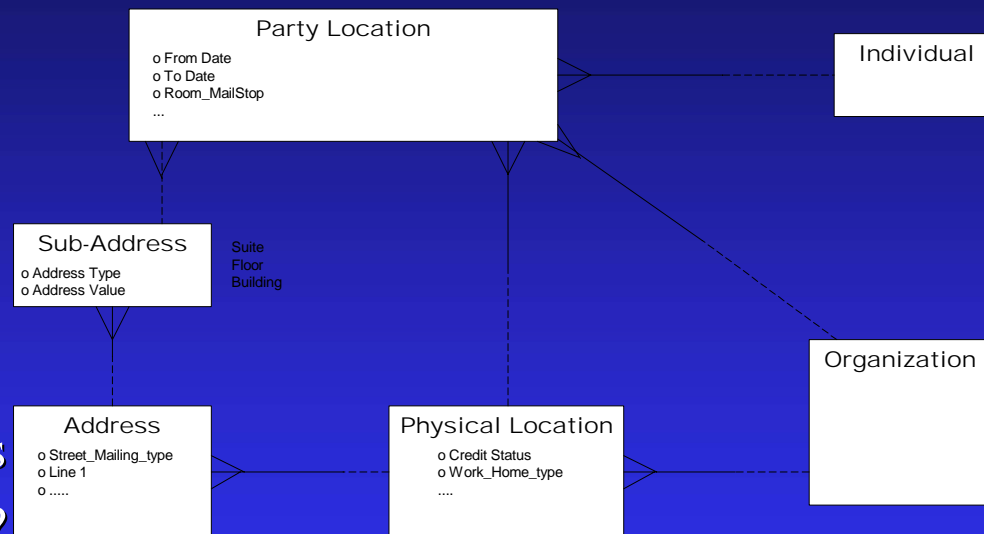
B-to-B Challenges

- **Organization Hierarchy**
  - ◆ Parsing data from existing system?
  - ◆ Purchase data?
  - ◆ Internal sources?
  - ◆ Ongoing maintenance?
- **Organization and Location**

Party Location
o From Date
o To Date
o Room_MailStop
...

Sub-Address
o Address Type
o Address Value

Suite
Floor
Building

Address
o Street_Mailing_type
o Line 1
o .....

Physical Location
o Credit Status
o Work_Home_type
....

Party

Individual

Organization

B-to-B Challenges

- Contact at an Organization
  - ◆ Position or Title
  - ◆ Physical location
  - ◆ Address
- Contact without an organization

Party Location

o From Date
o To Date
o Room_MailStop
...

Sub-Address

o Address Type
o Address Value

Suite
Floor
Building

Address

o Street_Mailing_type
o Line 1
o .....

Physical Location

o Credit Status
o Work_Home_type
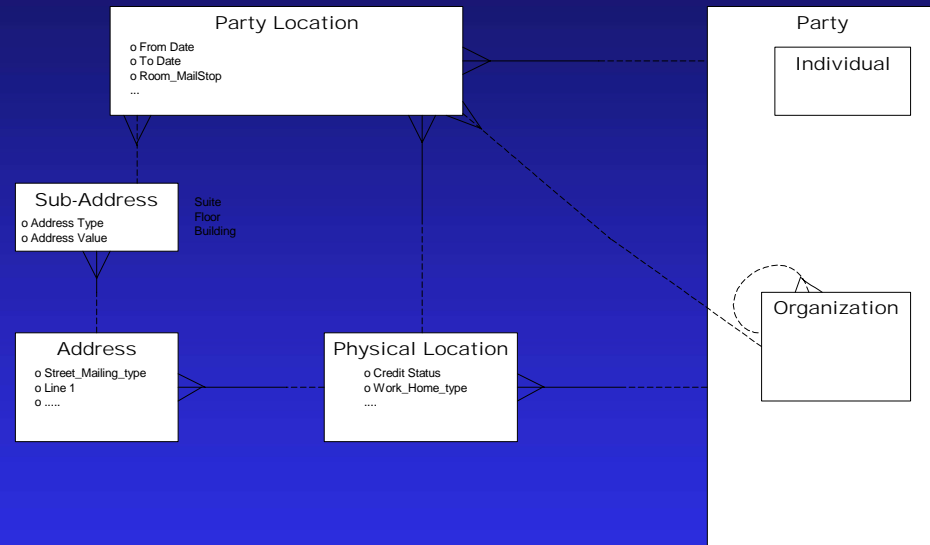....

Party

Individual
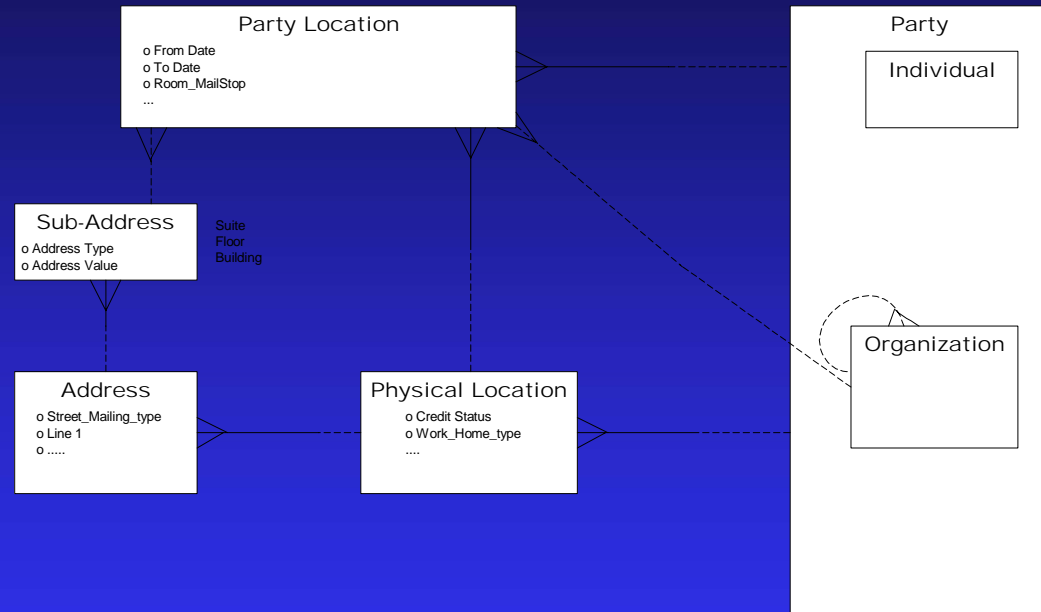
Organization

B-to-B Challenges - History

- Individual's Movements
  - Employment change
  - Location change
  - Move to another organization
- Organization Movements
  - Move to another location
  - Consolidation of locations
  - Re-org and other drastic changes

Party Location
o From Date
o To Date
o Room_MailStop
...

Sub-Address
o Address Type
o Address Value

Suite
Floor
Building

Address
o Street_Mailing_type
o Line 1
o .....

Physical Location
o Credit Status
o Work_Home_type
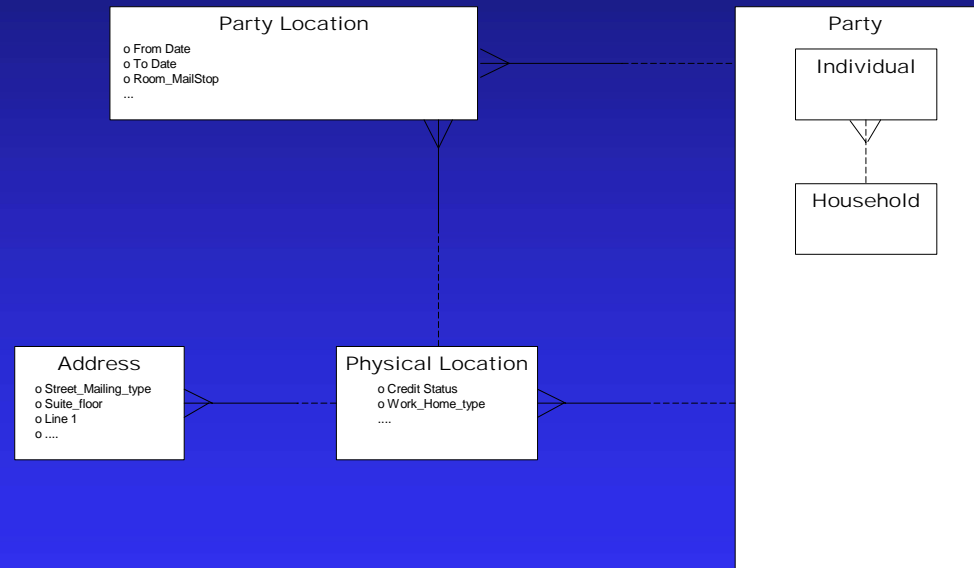....

Party

Individual

Organization

B-to-C Challenges

- Duplicate individuals
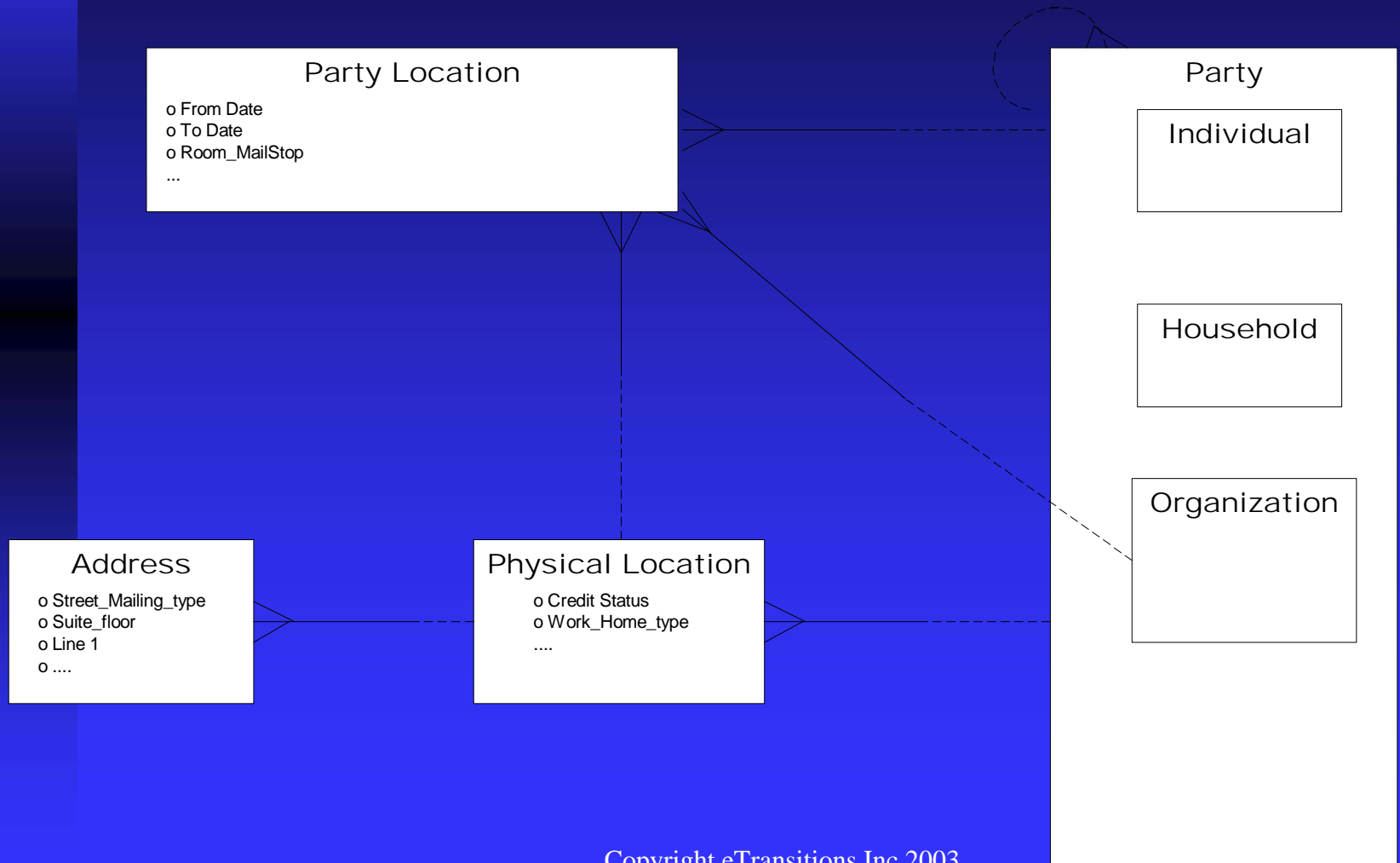 - SSN, Birthdate etc
  - Address
  - Data quality issues
- Households
  - How to determine?
  - Do we really care?
  - Third party tools & services

Party Location
o From Date
o To Date
o Room_MailStop
...

Party

Individual

Household

Address
o Street_Mailing_type
o Suite_floor
o Line 1
o ....

Physical Location
o Credit Status
o Work_Home_type
....

A Simpler Model

Party Location

o From Date
o To Date
o Room_MailStop
...

Party

Individual

Household

Organization

Address

o Street_Mailing_type
o Suite_floor
o Line 1
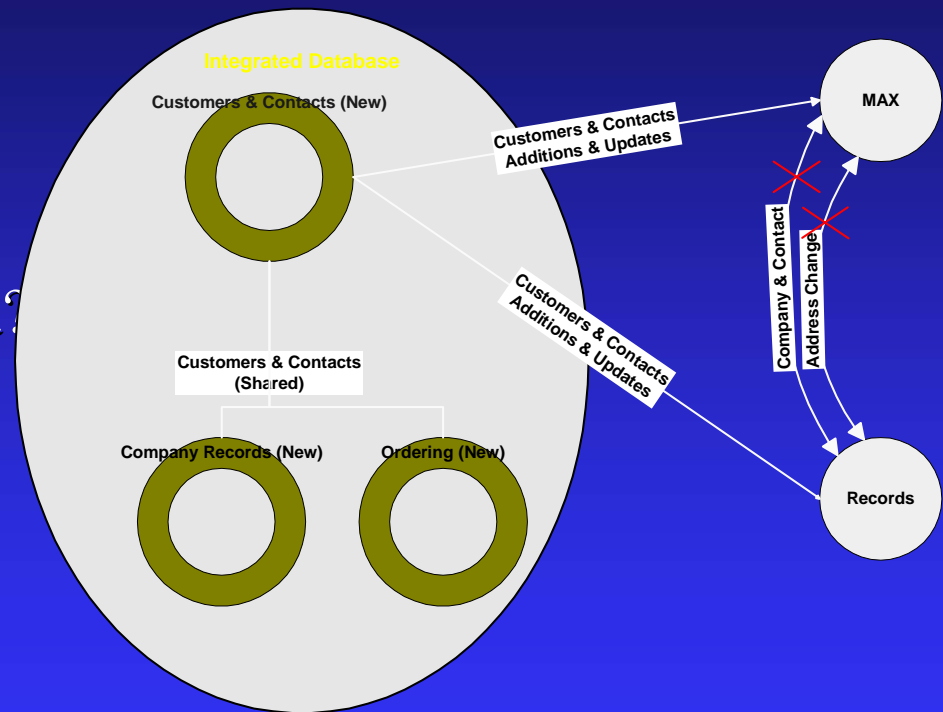o ....

Physical Location

o Credit Status
o Work_Home_type
....

What comes after?

- Do you know where you're going to?
- Which system will maintain customer data?
- How will it propagate?
- How will you avoid duplicates?

Integrated Database

Customers & Contacts (New)

Customers & Contacts (Shared)

Company Records (New)   Ordering (New)

Customers & Contacts Additions & Updates

Customers & Contacts Additions & Updates

Company & Contact Address Change

MAX

Records

Summary

- **Single instance of a Customer**
- **Business Processes to gather missing data**
- **Measure time and effort to gather & maintain**
- **Avoid complexity if possible**
  - Up-front estimates of effort to develop
  - Assessment of existing data
  - Determine sources of missing data
  - Cost/benefit to complexity

Resources

- NYOUG journal & Website www.nyoug.org
- eTransitions website www.etransitions.com

Questions???