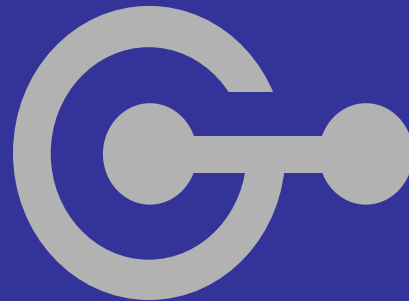


IT Consultancy Group bv  
Friesestraatweg 215  
9743 AD Groningen  
The Netherlands

ITCG



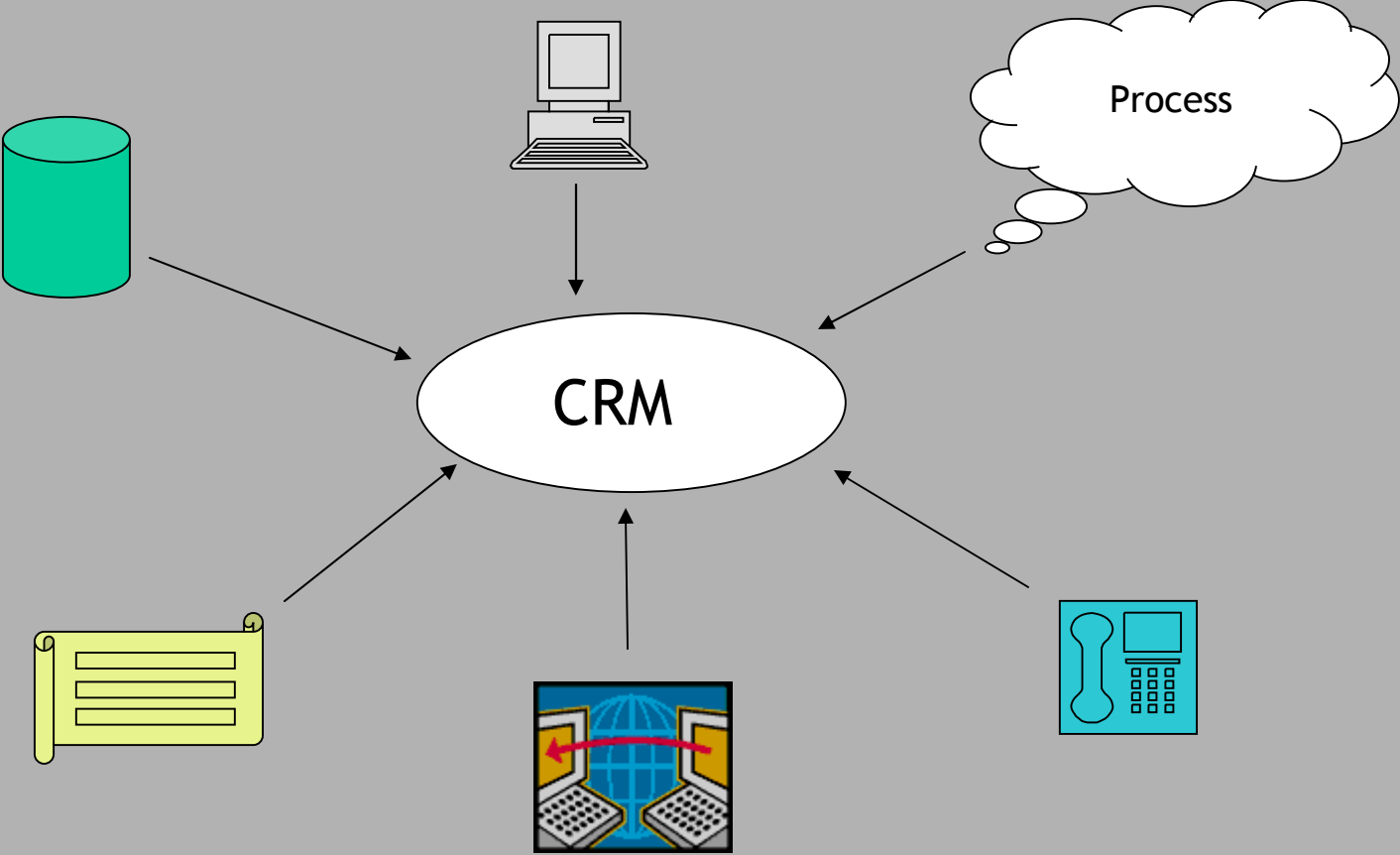
Paul Skaife  
e-mail [p.skaife@itcg.nl](mailto:p.skaife@itcg.nl)

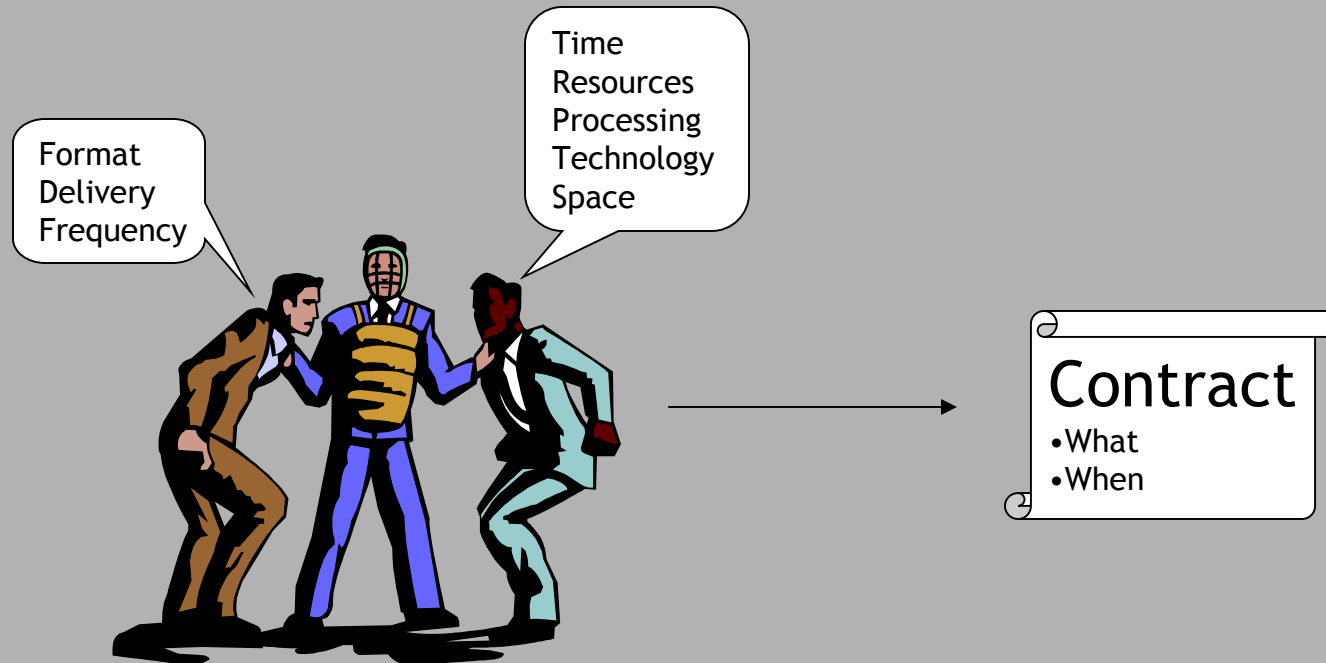
A guide to Migrating your Data into a new CRM  
System

“More than 75 percent of enterprises engaged in CRM initiatives cannot combine a comprehensive view of a customer ”

Gartner Group  
July 2002

- Data Logistics
- Quality Analysis
- Implementation
- Testing
- Maintenance



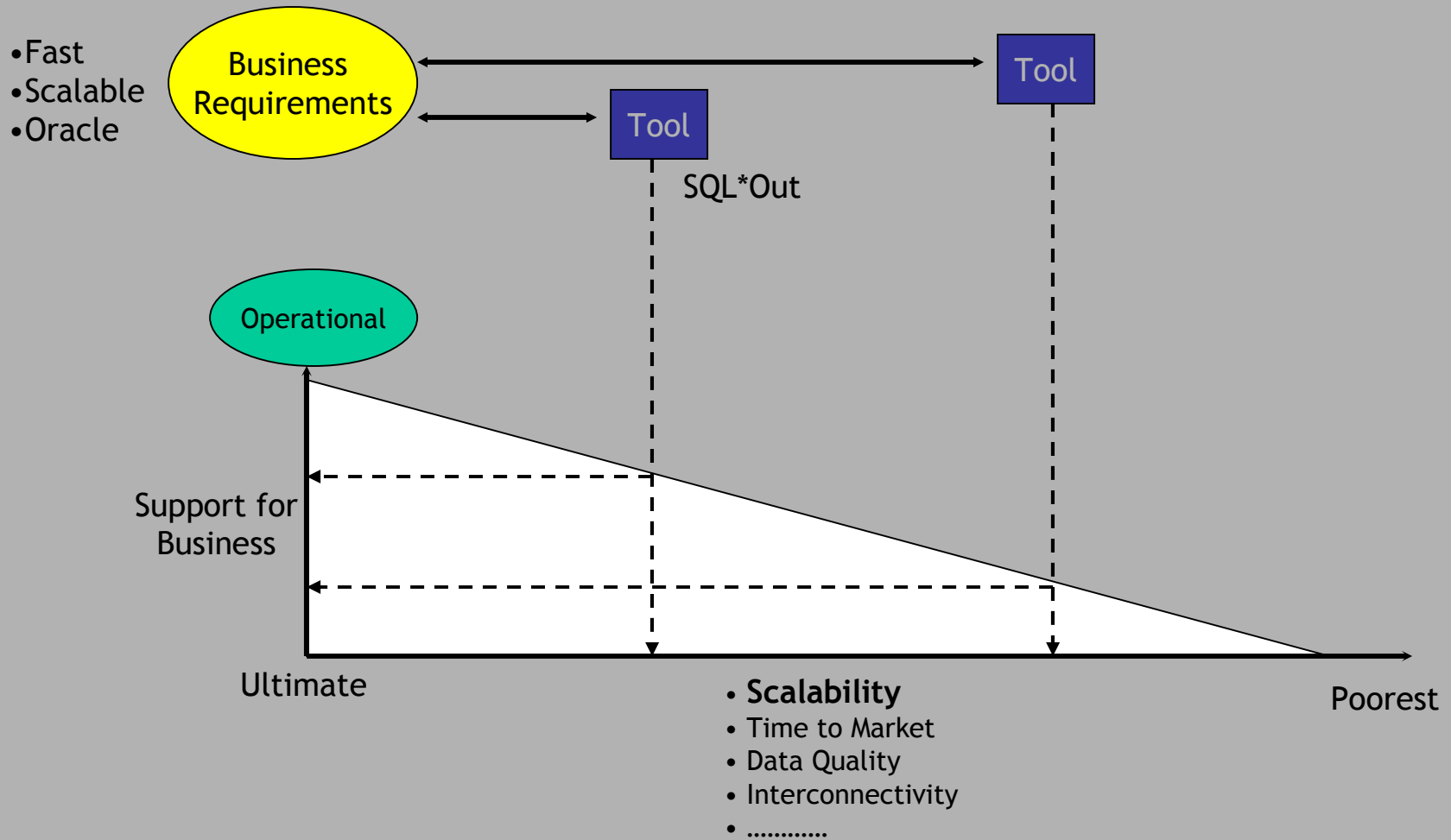


## Negotiation of a Contract

- Czech Telecom needed billing data for revenue and segmentation of Customers.
- Major issues
  - Volume of data
  - Size of extract file
  - Throughput time

- Czech Telecom billing data negotiations
  - 1.No billing data
  - 2.Some billing data
  - 3.All billing data once a month
- Billing is once a month so OK
  
- Not the end of the story

# Tool Selection Matrix - Extract





- Data Logistics
- **Quality Analysis**
- Design
- Development
- Testing
- Maintenance

How much money do you spend on CRM ?

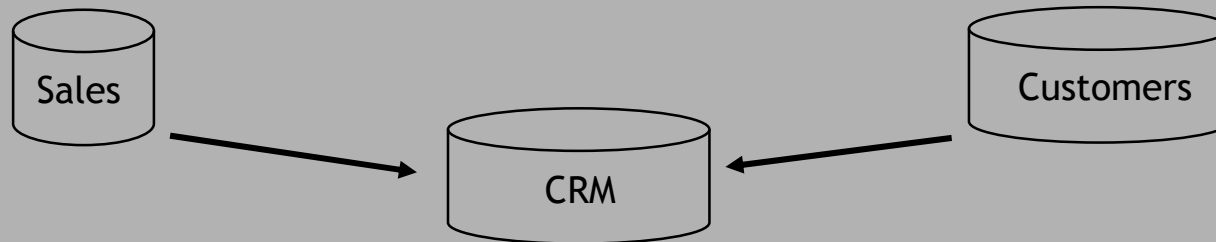
£1m .... £10m ??

How much money do you spend on data quality ?

??



When you have duplicate customers,  
How can you accurately view your customers ?



Bad Data leads to

- Inconsistent Data
- Inconsistent view of your Customers
- Decisions based on incorrect data
- Bad for business



**correct**



**complete**

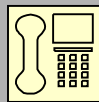
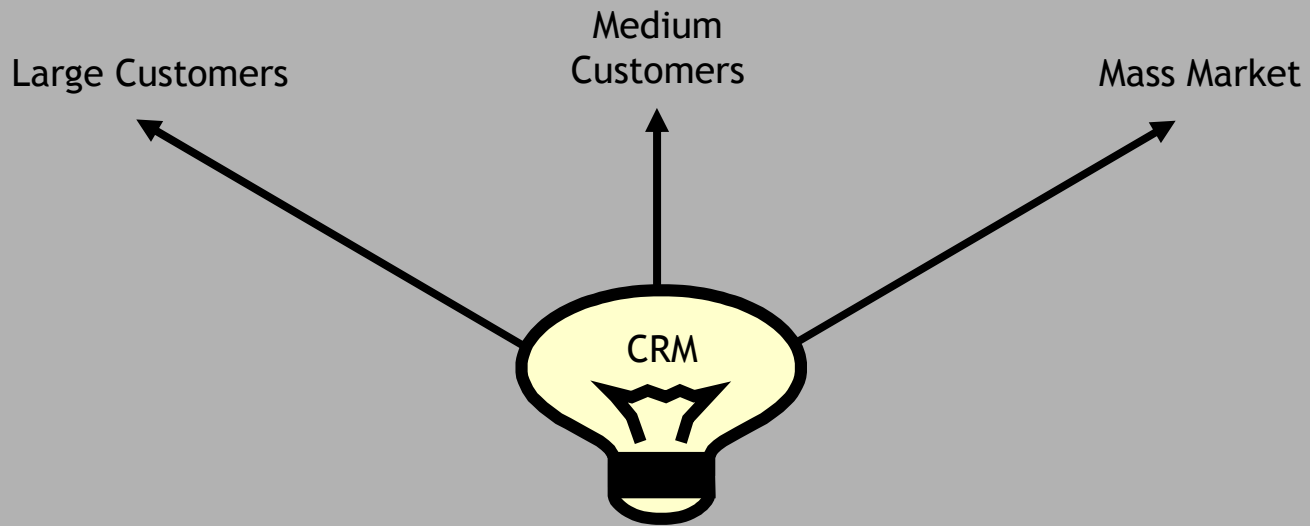


**consistent**



**current**

You need to define what these are !



A Company Director

- Recognise the issue
- Find the source of the Problem
  - Intelligent Tools
    - Identify Duplicates
    - Identify Relationship issues
    - Scalable
- Fix the process
- Fix the problem
  - In the Source
  - In the Data Warehouse



Pollution is everywhere

# Quality Analysis



CLUE: companies

Project Source Index Report About

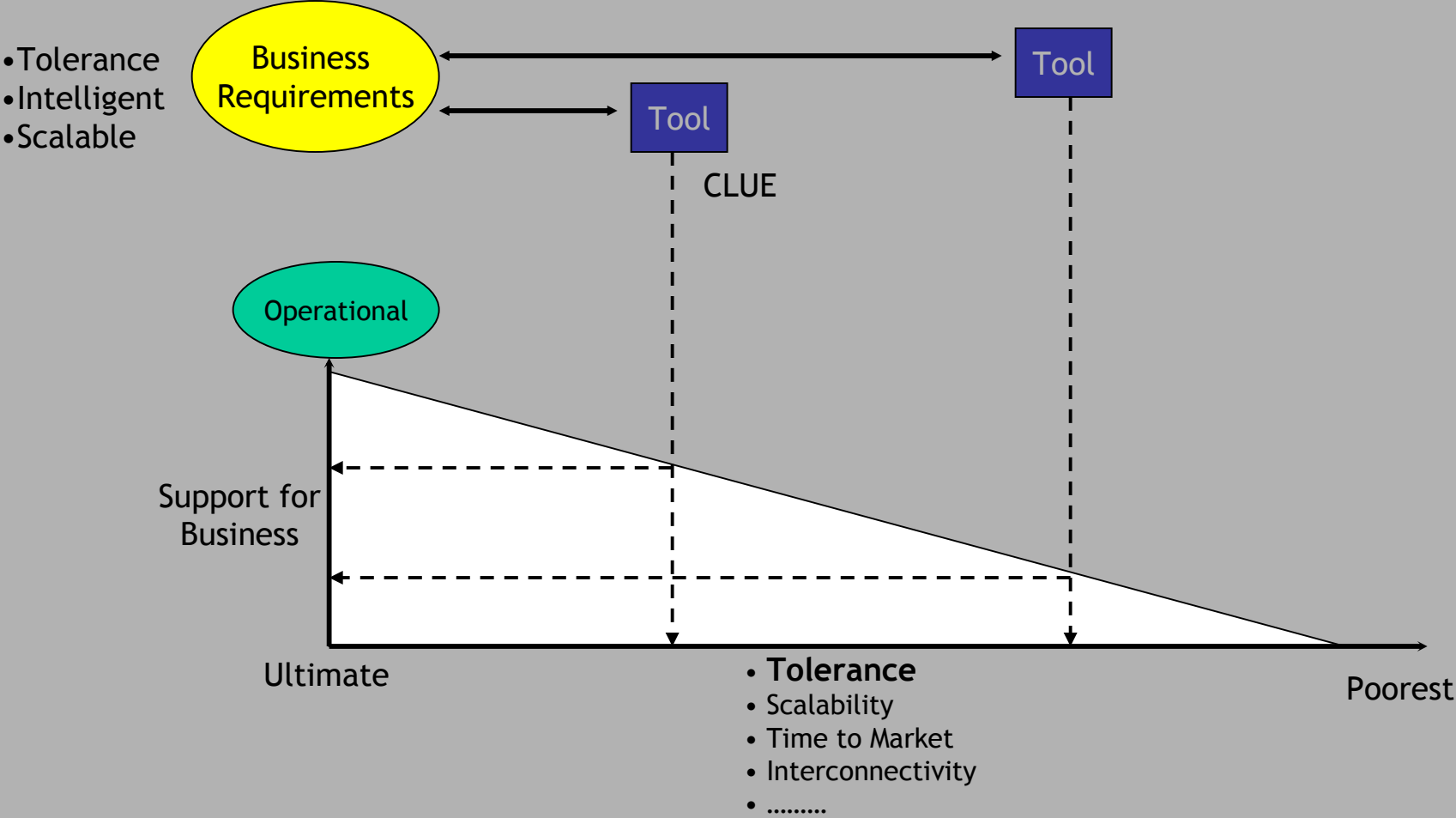
- companies
  - Source
    - name\_ad (992)
    - companies (172)
    - eng (9)
  - Index
    - cluster
      - name\_ad
    - companies
      - companies
    - Cov
      - eng
  - Report

Name	Address	City
Curys	234 Oxford Stre...	C. London
Currys	Oxford Street	London
Electrics Your	56 High Street	Yeovil
Your Electrics	57 High street	Yeovil
Y. Electrics	56 High Street	Yeovil
Blue Hat Software	17a Carr Lane	Birmingham
Red Hat Software	17a Carr Lane	Birmingham
Tesco Stores PLC	10 Ring Road	Burnley
Tesco plc.	10 Ring Road	Burnley

NUM



# Tool Selection Matrix - Quality

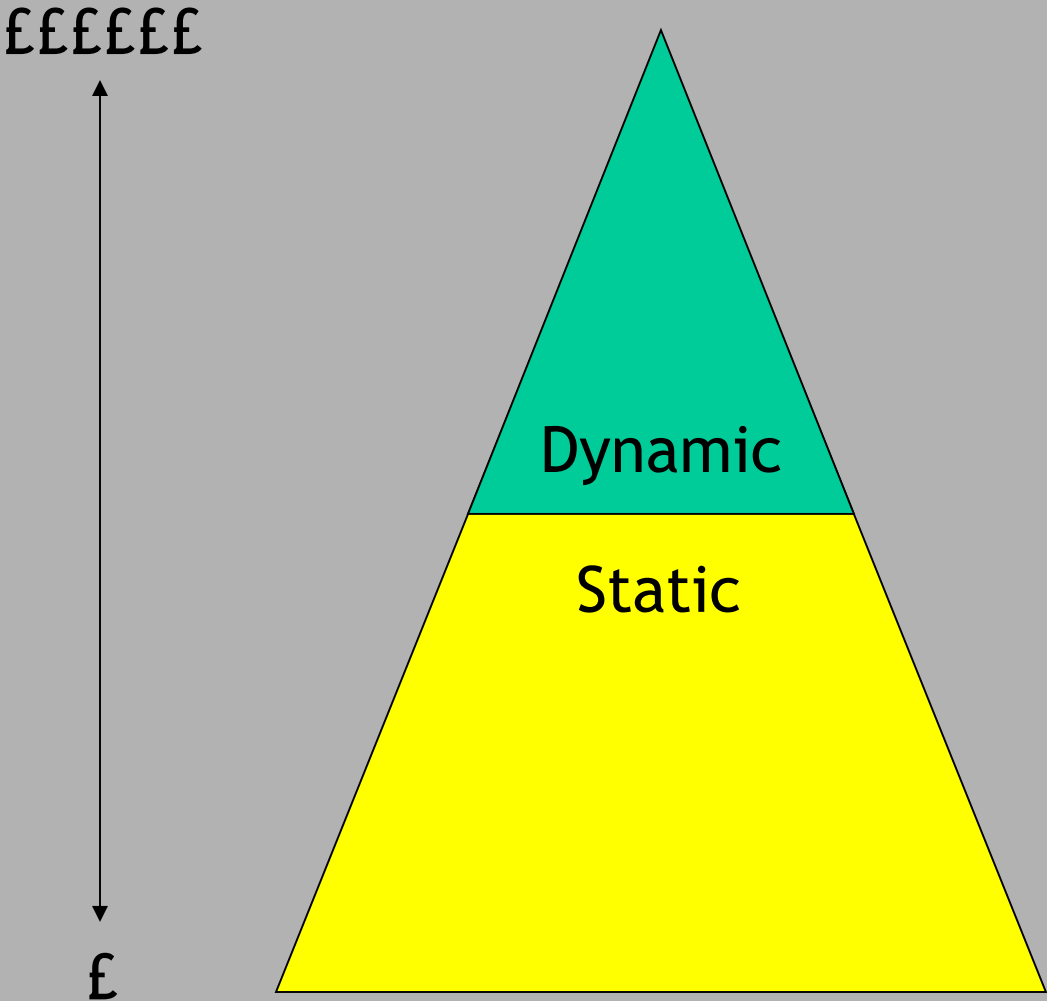


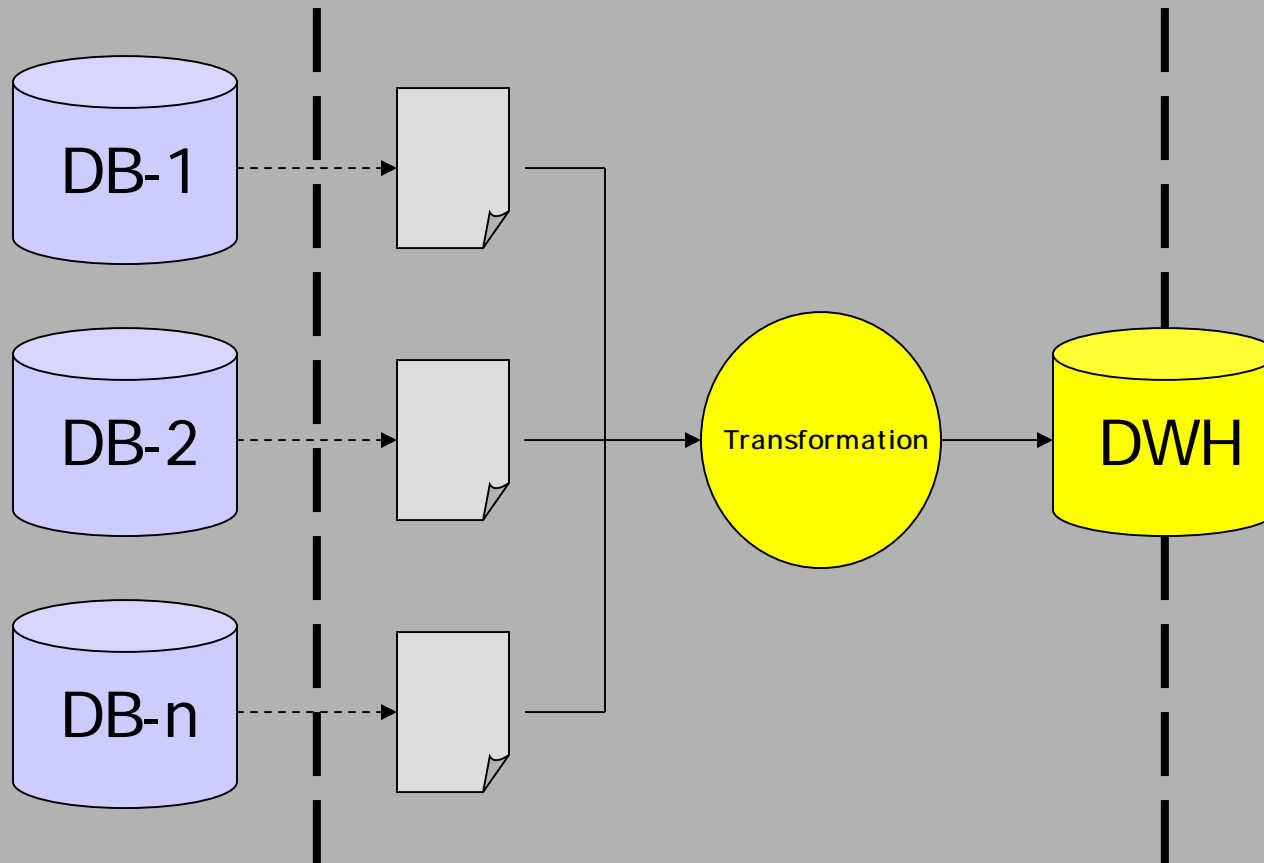


Never Trust a Stranger

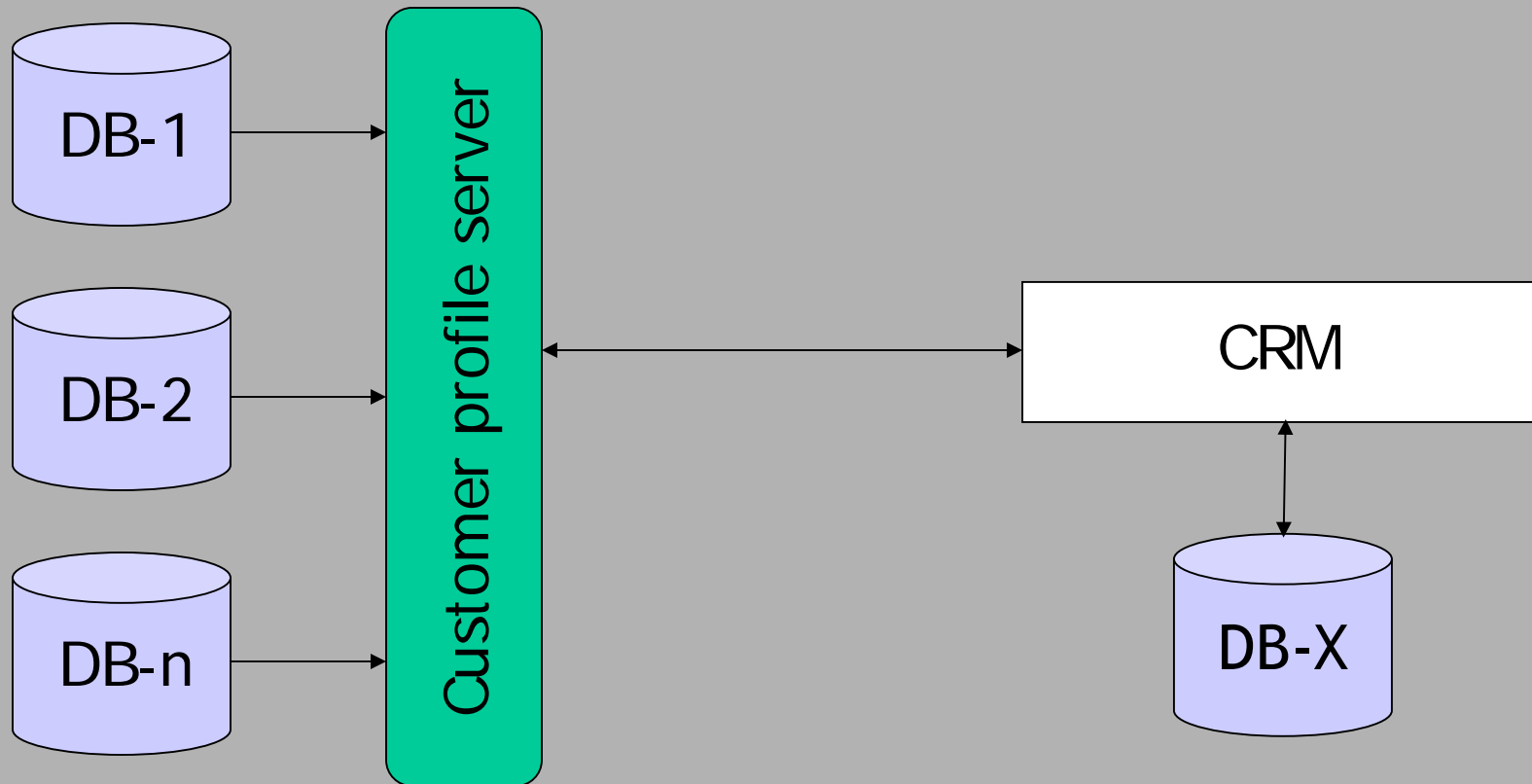
- Data Logistics
- Quality Analysis
- **Implementation**
  - Design
  - Development
- Testing
- Maintenance

- Architecture
- Deltas
- Target Model Design
- Specification





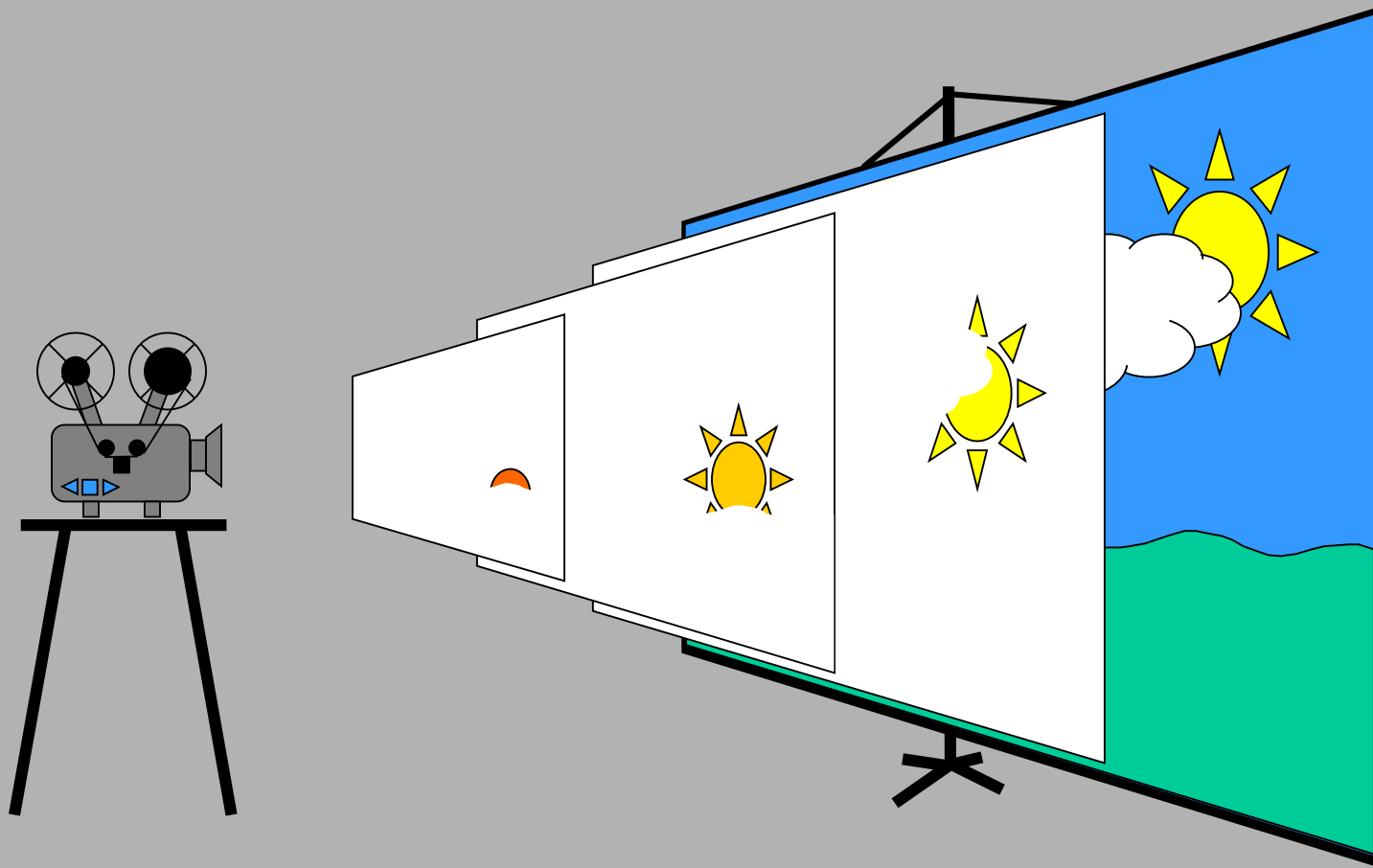
- Pros
  - Read-consistency
  - Uncoupled (Logically and Technically)
  - Best fit infrastructure (performance, storage)
  - Flexible time window
- Cons
  - Ageing data
  - Lack of Direct Source relations



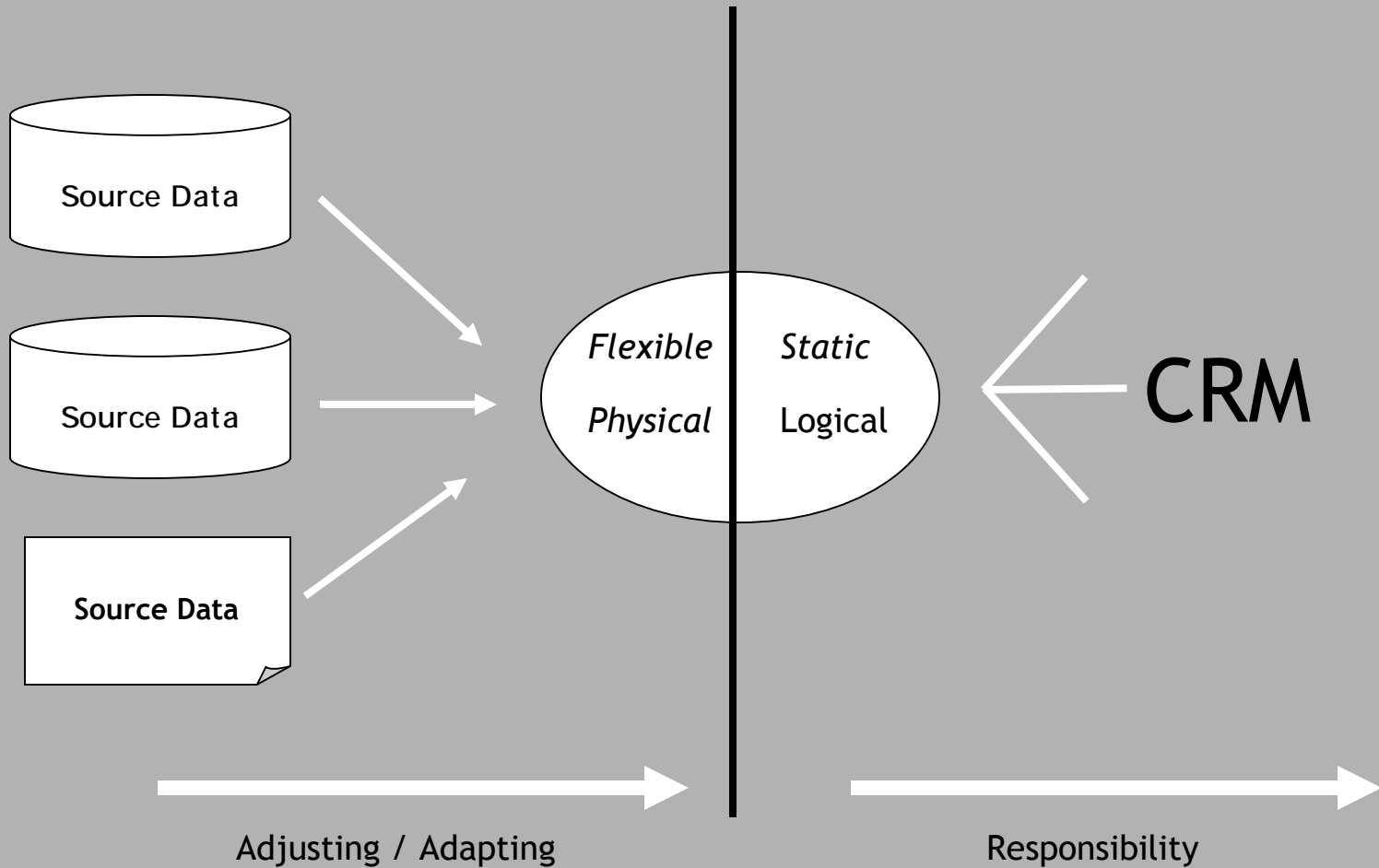


- Pros
  - up-to-date
  - sufficient for light processing and data interchange
- Cons
  - back-end dependency
  - complex infrastructure
  - complex matching logic

- Use Deltas because
  - Less Data
  - Less processing
- Use full extracts
  - Simpler
  - No problems of synchronisation
  - Simpler Design



It's not all about efficiency



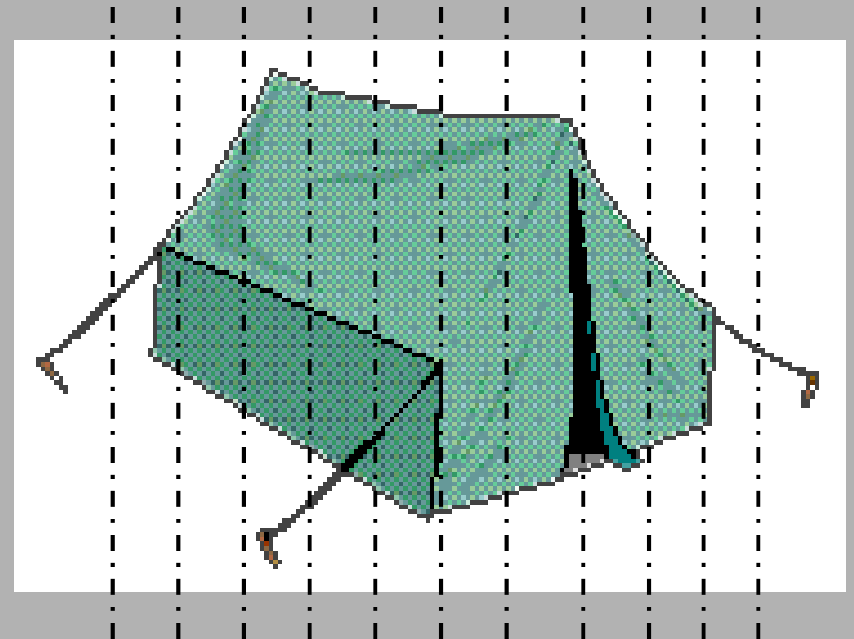
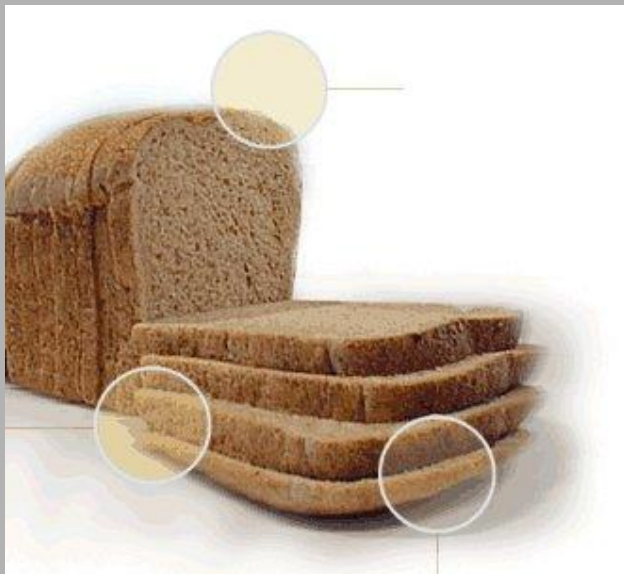
Logically the same



Technically Different

- Clear and communicable
- Target based
- Design patterns
  - Structured Specification
  - Correlation between Specification and Implementation
  - Help with the breakdown of problems
  - Should not be so constrictive as to inhibit

# Specification Example

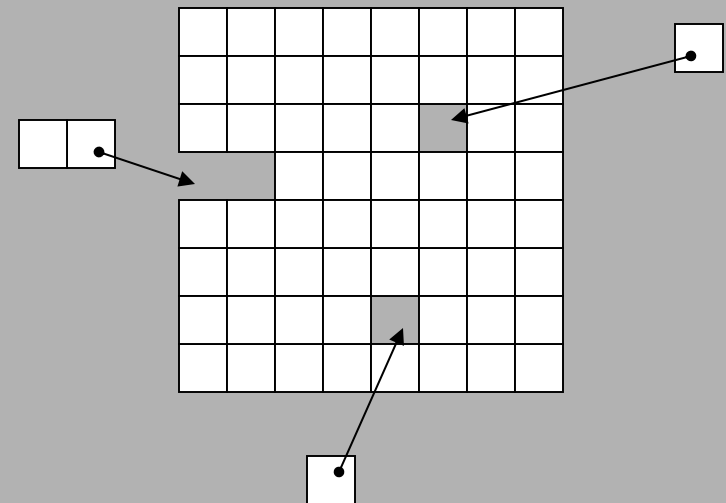


- Modularity
- Metadata
- Tools



- Manageable code
- Manageable problems
- Manageable development

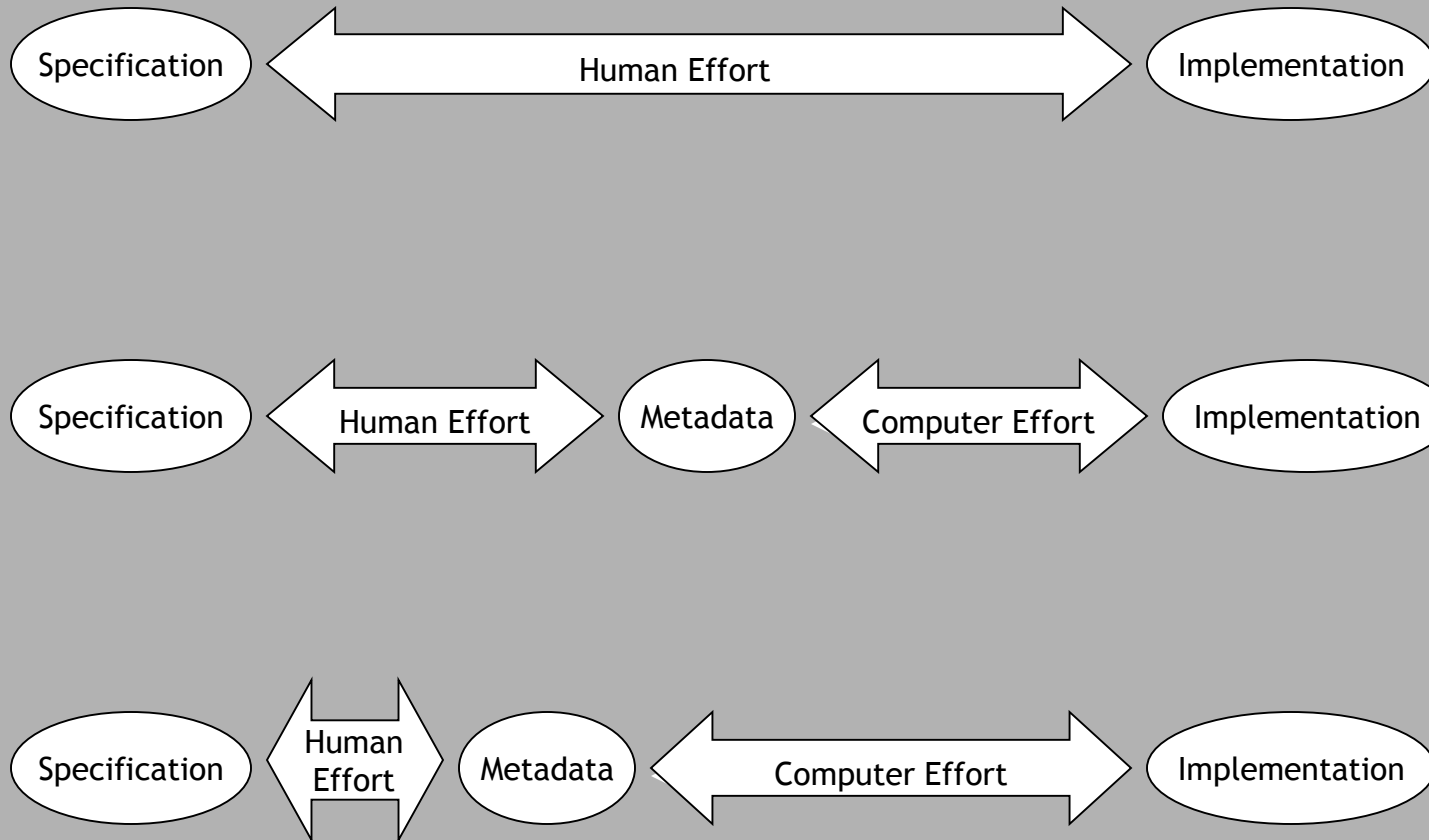
You can manage it !



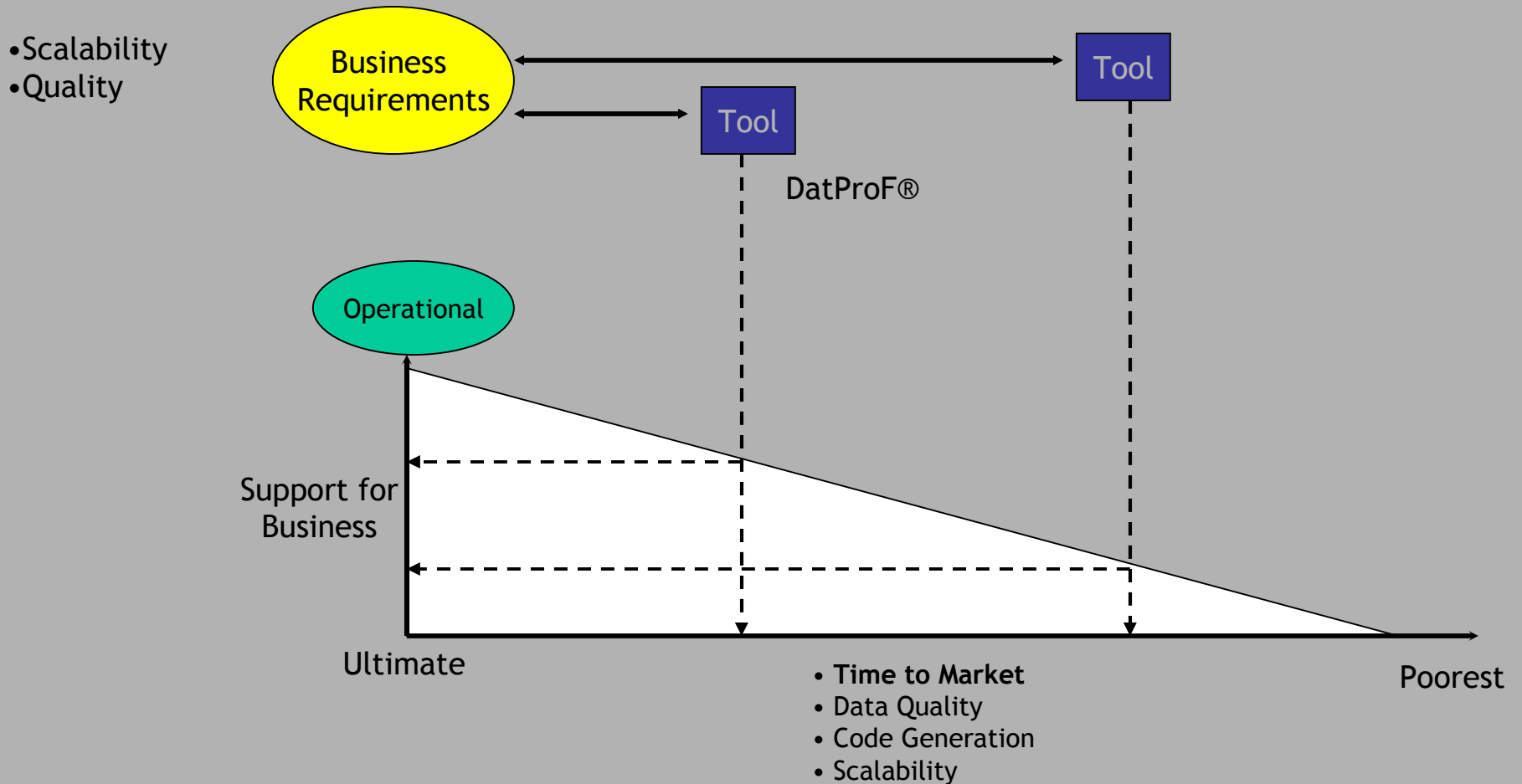
The key to the Puzzle

S  
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M  
S

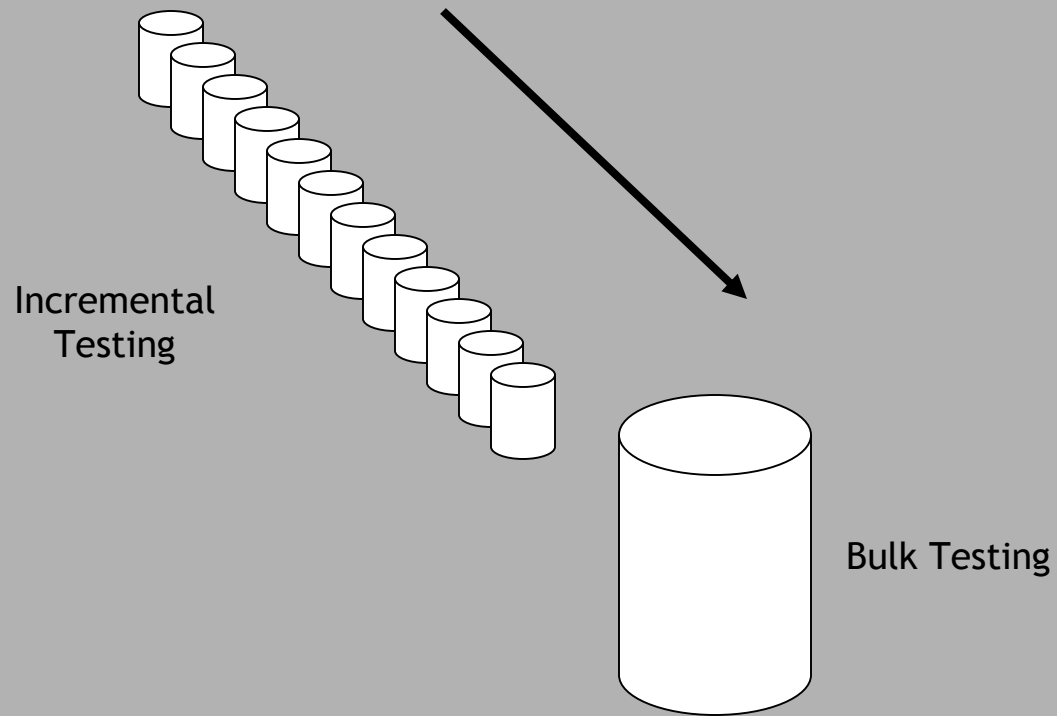
O  
P  
E  
R  
A  
T  
I  
O  
N  
A  
L  
  
C  
R  
M



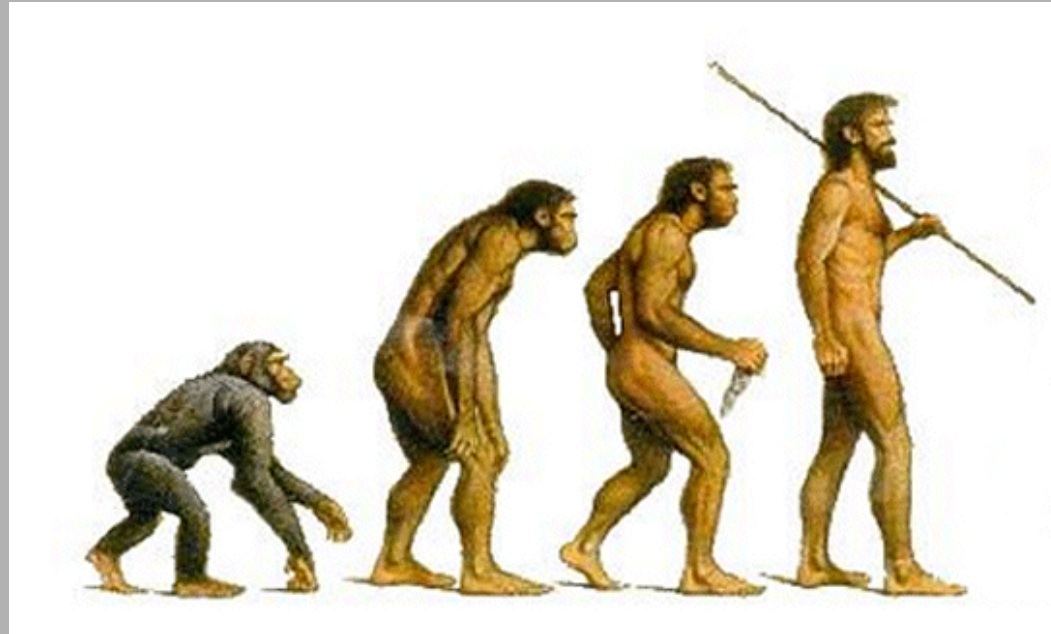
# Tool Selection Matrix - Conversion



- Data Logistics
- Quality Analysis
- Design
- Development
- **Testing**
- Maintenance



- Data Logistics
- Quality Analysis
- Design
- Development
- Testing
- Maintenance

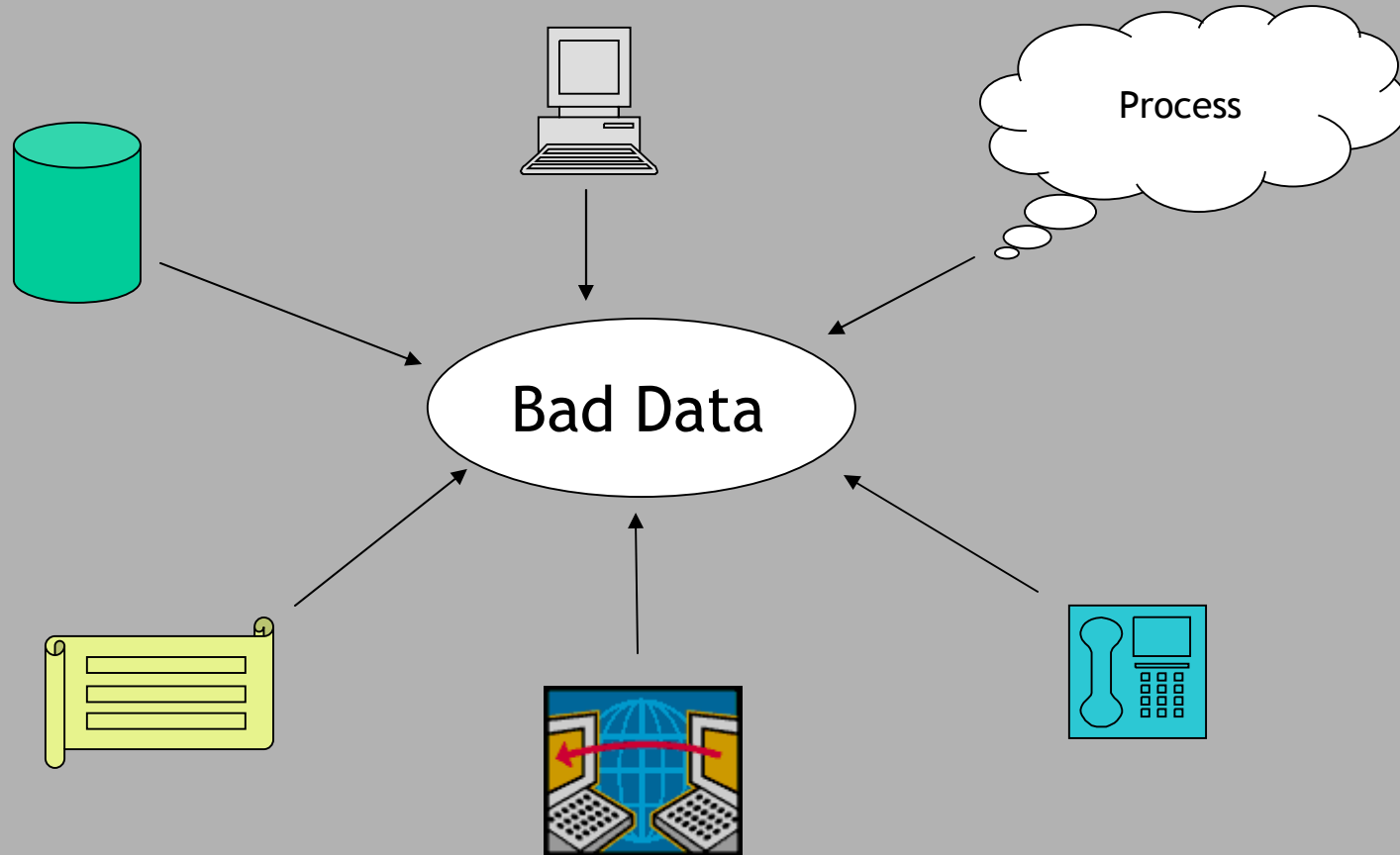


Your Data will constantly evolve

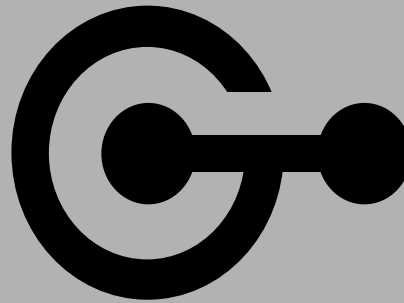


Pollution is everywhere





- Build and maintain contact with source systems
- Be ever vigilant to Data Quality
- Build up tools and knowledge in Data Conversion
- This is not a one off event



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p.skaife@itcg.nl