TITLE: DATA INTEGRITY AT INSTRUMENT MANUFACTURER - NAICS CODES

Company Instrument Manufacturer

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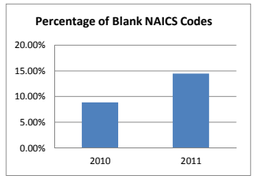
PROBLEM STATEMENT

Errors in our NAICS Codes for Instrument Manufacturers Customers causing gaps in information, distrust in results of sales analysis, and errors in forecasting by industry.

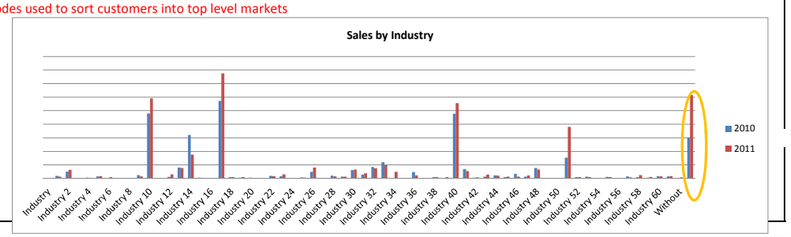
BACKGROUND:



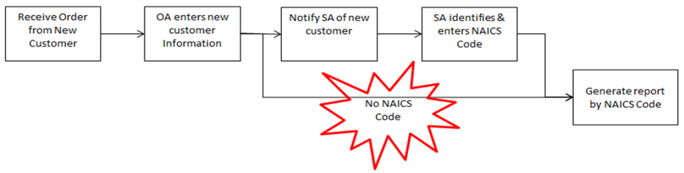
Number of Customers with Missing NAICS codes

3/20/2012 1581

- Marketing unable to use data to create a strategy
- In 1994 we created upper level codes to group industries; it's not been updated since.
  - Codes used to sort customers into top level markets

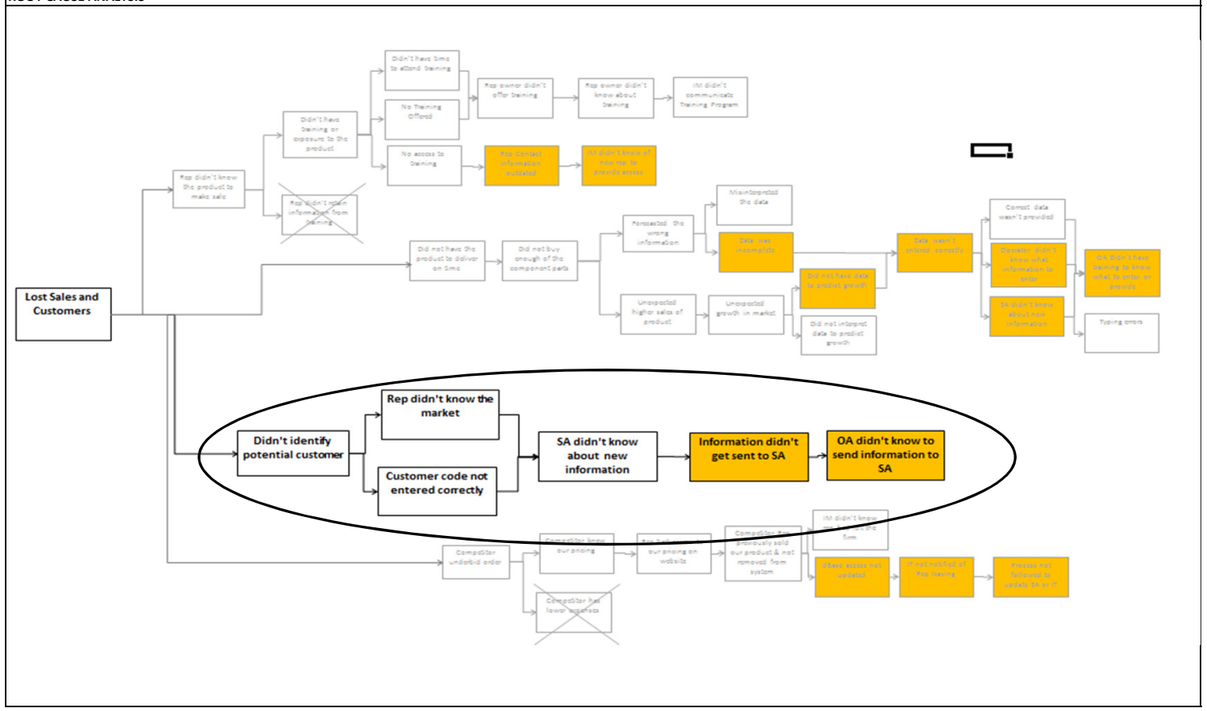


CURRENT CONDITION:



- Current listing is 24 pages long
- Can process approximately 60 customer NAICS codes per day.

ROOT CAUSE ANALYSIS



GOAL/TARGET CONDITION:

Correct NAICS codes and develop and implement a process for maintaining and verifying the codes by June 1 2012

Train all Sales employees on the process by June 30 2012

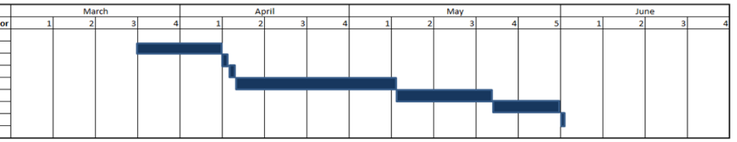
Zero End User customer without NAICS codes verified at the end of 3rd and 4th Quarter, 2012

- Max 30 per day (typically each OA has 3-5 new customers per day)

IMPLEMENTATION PLAN:

- Identify codes and verify accuracy to current practices
- Update report to insure accuracy Go to: US-DC01\DATAAPPS\REPORTS\ORDER
- Identify active customers (quotes or orders ≥2 years)

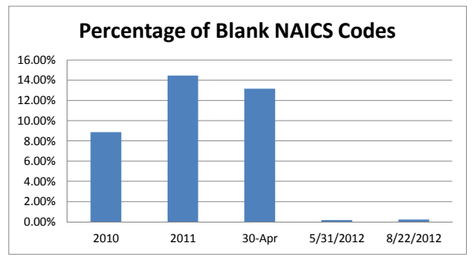
	Task	Duration	Start	Finish	Predecessor
1	NAICS Codes	78	3/26/2011	3/12/2012	
2	Identify metric to monitor	10	3/26/2012	4/5/2012	1
3	Determine information needed	1	4/5/2012	4/6/2012	2
4	Determine source for code	1	4/6/2012	4/7/2012	3
5	Clean data	30	4/7/2012	5/7/2012	4
6	Identify & document process	15	5/7/2012	5/22/2012	5
7	Verify process	20	5/22/2012	6/11/2012	6
8	Close	1	6/11/2012	6/12/2012	7



FOLLOW-UP

- 1274 Active customers without NAICS codes
  - Try to finish address all 1274 by 5/31/12; IS may be able to help by 5/15; Natalie to help too
  - Updated all NAICS codes. Currently there are no unmarked customers.
  - Ron ran a report and there was less than $2000 in unknown funds
- Which reports on report portal are needed?
  - All are outdated. Need to update

- What does "Export Share" number do (is this how NAICS Cube is pulled)?
  - How do we stop using "Export Share" to eliminate duplication of entry?
  - IT synchronized the two fields, but there were 1400 discrepancies between the fields.
    - Changed data back; printed a report of the discrepancies to give to Sales to correct
- Erin to send list of customers not listed in Hoover to Regional managers for guidance on NAICS codes
- Does TopVis list all NAICS Codes?
  - No, will need to notify IT when a new code is found, then it will need to be linked to the Groh list.



- 4800 customers with differing codes - IT to force backward from Export Share field.
- Erin will send new ones as needed to the Regionals (about 3 per month)
- Need to clean up data; concerned others are incorrectly marked - Erin will separate Customer ID's by industry and give to Industry Mgr to clean up

7/31/12 Closed…Monitoring

REFLECTIONS

- Determine impact on the business in order to determine if the change is positive
- NAICS codes have huge impact on how the business determines the sales strategy