TITLE: DATA INTEGRITY AT INSTRUMENT MANUFACTURER - CUSTOMER DATA

PROBLEM STATEMENT

Customer information has symbols in names or addresses, periods for an address, "attention" information in the address, or the customer name is duplicated causing longer order entry times (10%) and errors in invoicing and shipping (up to 25%).

Company **Instrument Manufacturer**

Team **Gretchen L., Dennis A., Erin S., Cathy S., Will B., Eric A. Natalie V.**

Date: **November 28, 2012**

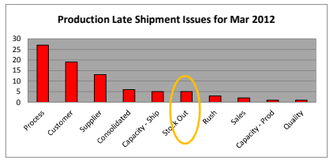
BACKGROUND:

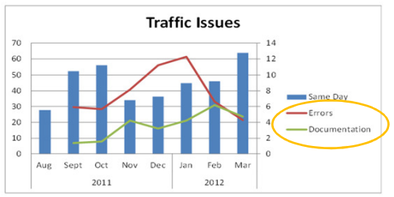
People worked around the order entry software to quickly enter orders
- When TopVis was initially introduced people worked around the system by entering "." instead of addresses so an order could be quickly entered.
- If a customer could not be quickly identified in the system, then the information would be entered again.
- If a customer add multiple "Ship To" addresses, then each required a separate ID
- If information is wrong and the OA sees the issue, they'll correct the information adding 30-120 sec to 15 minute entry process

GOAL/TARGET CONDITION:

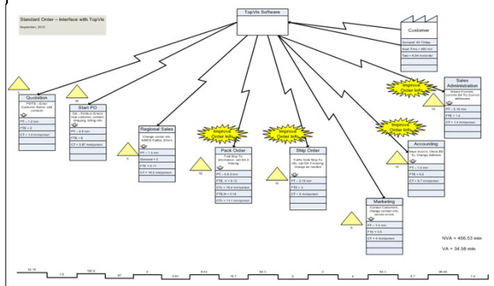
To remove duplications and incomplete customer data by 1st quarter 2013 while establishing standardized practices for entry of new customer information

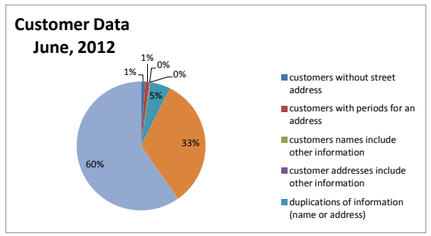
CURRENT CONDITION:





262	customers without street address
258	customers with periods for an address
20	customers names include other information
32	customer addresses include other information
1232	duplications of information (name or address)
7896	Active Customer
14396	Customers without errors
16200	Customers in Database





78	customers without street address
79	customers with periods for an address
19	customers names include other information
36	customer addresses include other information
659	duplications of information (name or address)
7896	Active Customer
15329	Customers without errors
16200	Customers in Database

IMPLEMENTATION PLAN:

7/23/2012
- OA's available to help clean up data
  - Start on customers without address information - domestic customers
- Natalie to show Sales how to search by including inactive customers
  - criteria for Active customer includes activity (Order, Quote, Service call) within 2 years
    - Check for mergers of data - will have a red note on the front page
    - inactive customer will show up in gray on the list
- **Michelle to define the criteria for CUID information
- **Michelle & Natalie to review documents on Searching & Adding customers

8/15/2012 (meeting with Mari)

- Need to make VSM ofwhole order process to track impact of customer information through-out the organization.	G. Lisi		9/1/2012
- Sales is working cleaning up addresses with periods and addresses with other information	M. Moore	??	
- Work with team to flush out the problem statement and root cause issues.	G. Lisi		9/1/2012

8/22/2012
- Reviewed status after 3 weeks off...Eric to make all data "live" to monitor progress
- No activity to correct any issues at this time
- The active customer listing is based upon previous 24 months activity - not by a designated date (i.e. 1/1/12)
- At this time, OA's can't automatically search for a customer in the Active & Inactive database; they'll need to switch between them
- After cleaning up the data, we'll need to determine how to doa a mass switch from Active to Inactive designations through IT (vs. one at a time)
- Scott Rollman is asking if we can designate orders by end users NAICS code even if the rep is the buyer. We don't think it will matter - the monies are designated by buyer/customer

9/26/2012
- New member from Sales - revisited problem statement and what we've done to date

- Reviewed list of Missing addresses, wrong characters. We'll get Sales Co-Op to sort data & use Hoover's to identify address	G. Lisi		10/1/2012
- complete sorting within 2 weeks; get clarification from Cathy & Erin			10/14/2012

- Inactive customers will be those with no activity for 5 years (to minimize searching in 2 dbases)

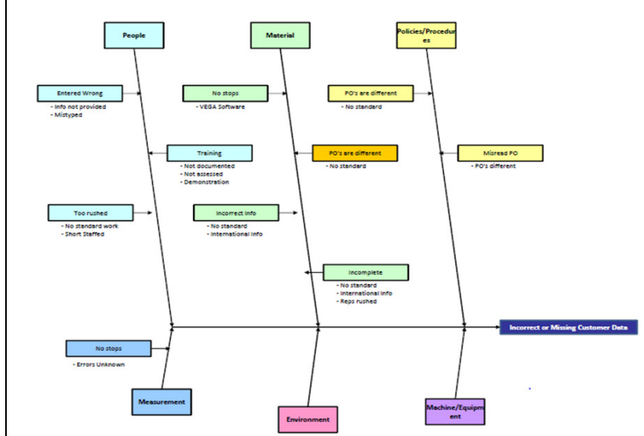
10/24/12: Updated cleaning of data (see chart)
- Updated cleaning of data (see chart)
- Need OA help on duplications and special characters
  - Talked to Michelle and they need some basic guidelines
    - Don't use all caps
    - Use Address Doctor
    - No special characters - i.e. punctuation marks, #&%:", etc)
      - Need decision on if Company name has a hyphen - Michelle said replace it with a space.
- Erin to check with YiYing on any issues which may help us identify other training points.
- Gretchen to check with Chloe on the number of hours YiYing spent
- Gretchen's asked team, Michelle, and Ron H. to determine what other issues need addressed.

10/31/2012
- YiYing is progressing

Task	Description	Responsibility	Due

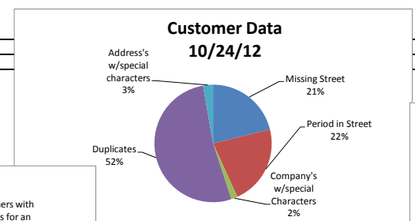
11/21/2012
- New numbers on data clean up (created new graph)
- Meet in February to check on maintenance

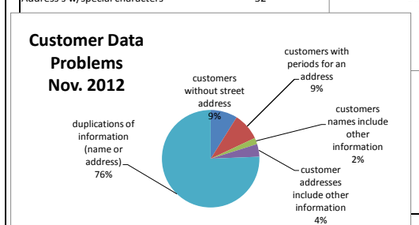
ROOT CAUSE ANALYSIS

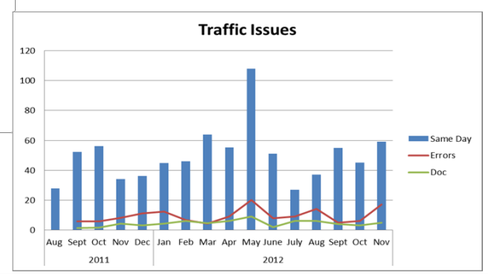


FOLLOW-UP

Missing Street	246
Period in Street	257
Company's w/special Characters	20
Duplicates	609
Address's w/special characters	32







REFLECTIONS

Obstacles...
- We've lost steam - summer vacations, other projects
- Identifying and implementing a Maintenance plan that will transfer even after people leave.
- Good to rejuvenate team and get back to basics

10/24/2012