

# DMM Review

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## Action-Oriented Stewardship

The prevalence of enterprise applications and the emphasis on closing the loop between operational systems and data warehousing applications has catapulted data quality to the forefront of consideration for many organizations. Common practice includes incorporating data profiling and cleansing activities into data warehouse and customer relationship management (CRM) project plans. Vendors often suggest that full leverage of their tools requires utilization of results from profiling activities to identify data problems and their root causes, recommend solutions and change business processes. These suggestions go far beyond the traditional data warehouse or CRM implementation project. In fact, they beg for the type of business intelligence (BI) and data stewardship excellence centers that are gaining in popularity today. The excellence center is a formal group that spans the organization, has both staff and technology, and aims to manage the corporation's BI or data assets in order to ensure high reusability, accessibility and quality.

Establishing a formal center of excellence is like buying a top-of-the-line luxury car with the best possible protection package and warranty; expensive, but also the most effective way to ensure a consistent, high-quality ride. Let's say you have budget and sponsorship to start a data warehouse program or implement a CRM application, but it's not quite enough to establish the enterprise center of excellence advocated by the experts. Are you relegated to taking the bus? Not necessarily. With the proper building blocks in place and the management of a few critical success factors, you should be able to fully leverage your technology, fix (not just identify) data problems at the root cause and

even effect changes to business processes, albeit on a smaller scale - one limited to those quality problems affecting your BI or CRM project.

### Program-Oriented Stewardship

Consider the following example: a financial services organization built a customer operational data store (ODS) as the first step of a journey to achieve a 360-degree view of its customers. The executives of the organization suspected that there was strong potential for business owners using the corporate products to also use products and services geared to consumers. This was a largely untapped market with strong revenue potential and relatively low acquisition costs, and the executives hoped to utilize the ODS to see existing businesspeople who already owned retail products and to highlight other business owners who could be targeted for this campaign. Early in the project, however, data profiling activities brought to light a quality issue that would limit the achievable matches between business and retail customers and lower the potential value of the ODS. Preliminary discussions with the small business group yielded some interesting issues.

### The Problems: Cultural and Technical

Relationship managers in the small business group worked closely with key employees in small and medium-sized businesses. The relationship managers focused primarily on gathering information related to the business and were hesitant to ask for the personal contact information required to achieve a match between key contacts for the organization and individuals in the consumer database. This hesitance stemmed in part

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from a failed attempt to gather home addresses in the distant past as well as from a lack of easily navigable screens to collect the information. Managers were also concerned about cannibalization, e.g., the possibility that business customers solicited for retail products might switch from business to retail altogether, rather than simply adding new retail products to complement the existing business mix.

### **The Solution: Stewardship by Action Teams**

While the organization did not have a formal stewardship group, it did have:

- A strong program manager who understood the necessity to resolve this issue, even though it was outside the realm of the ODS project.
- An active executive-steering committee that spanned all involved business units and understood the potential of the ODS.
- A mechanism for setting organizational objectives that spanned business units.

The program manager proposed to the steering committee a series of action teams to work in conjunction with the ODS project team to resolve the identified issues. The proposal was accepted. One team contained members of the small business group, the training group, the legal team and customer service. They were responsible for understanding the past information collection failure, exploring the potential impacts of starting to collect home contact information again, and developing call scripts and training programs for the relationship managers. They were also

tasked with coming up with objectives for the relationship managers that rewarded them for information collection, even if this collection resulted in products acquired that were outside the products for which they normally received commissions.

The second team consisted of IT programmers responsible for the small business transaction system, ODS project team members and a customer service representative. This team designed and implemented new data entry screens on the small business system to facilitate easy capture of the new information. The last team started after the ODS was complete and consisted of business analysts and marketing folks. They monitored the customers solicited for both types of products and ensured that the feared cannibalization did not materialize. They also developed strategies to change the solicitations where the impacts of dual product solicitation were negative.

Lacking a formal data stewardship organization, but utilizing simple building blocks of executive support, a strong steering committee, program management and the ability to establish objectives and compensation, this organization was able to accomplish changes far exceeding the bounds of the ODS project itself. These changes made it possible to realize strong benefit from the ODS and also helped to break down some of the existing organizational boundaries. 

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