



How to guide a DQ-project through a migration ?

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28 January 2010




Agenda



- Introduction
- Status customer Database and DQ-project before the migration
- Migration – issues during migration
- Preserving the DQ-level
- Critical success factors
- Current status – what after implementation ?

VIVIUM - Introduction

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- Belgian Insurance company
 - Member of the P&V-Group
 - Sale of Life and Non-Life products via independant brokers
 - 1.705 collaborators (1.004 within VIVIUM)
 - Turnover P&V-Group : 1,5 bilj. Euro

Customer DB – status before migration



PALM
(ex ING Ins)

800.000

90% BtoC

DQ project started
in 2004

known quality


BDP
(VIVIUM DB)

2.000.000


(customers, brokers,
suppliers, lawyers,...)

unknown quality

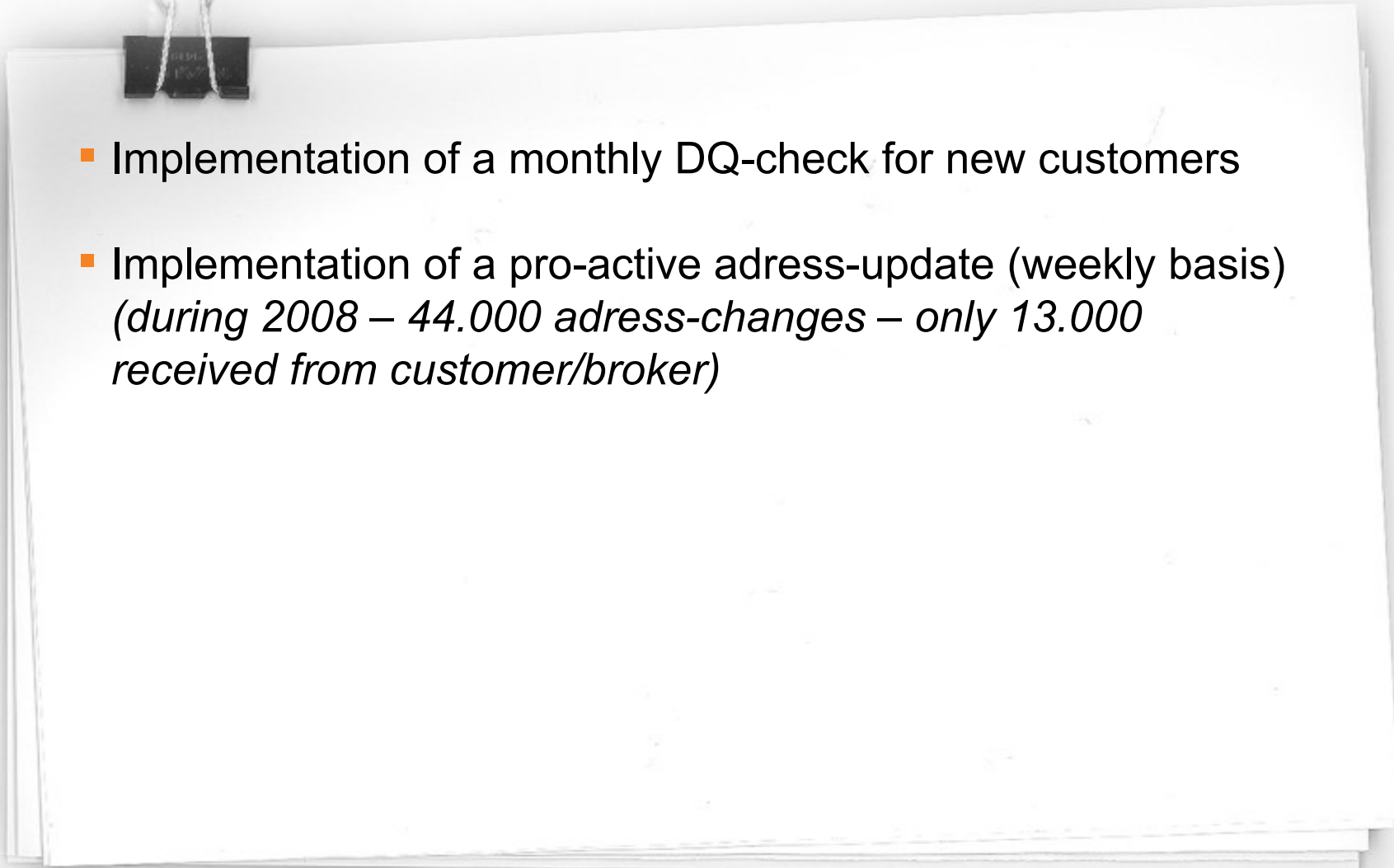
Project Dataquality ex ING Ins.

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- Project started six years ago
 - Major drivers :
 - no effective cross- and up-selling without correct customer data.
 - correct risk assessment during acceptance
 - Additional Benefits :
 - faster customer identification in the service-centers
 - reduction of postal returns
 - more accurate 'customer image'

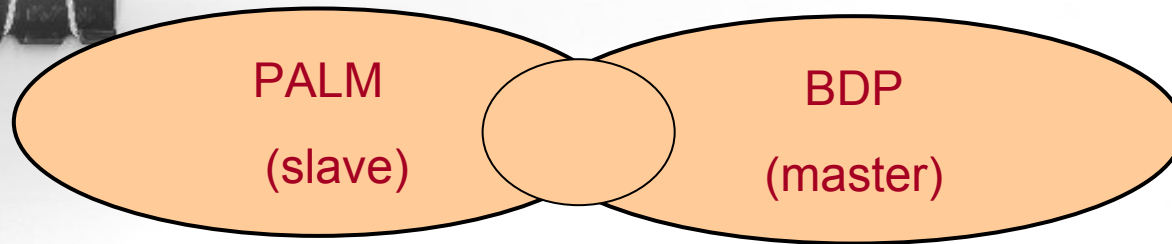
Realisations before the migration

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- New rules/controls/values implemented in the database
 - Change-management (DQ steward network)
 - We gave DQ a 'face' = DQ-watch = bimonthly DQ-report
 - Check of customer data with an external DQ-partner (all customers with active contract checked during 2007)
 - Broker-awareness for DQ

Realisations before the migration


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- Implementation of a monthly DQ-check for new customers
 - Implementation of a pro-active adress-update (weekly basis)
(during 2008 – 44.000 adress-changes – only 13.000 received from customer/broker)

Migration

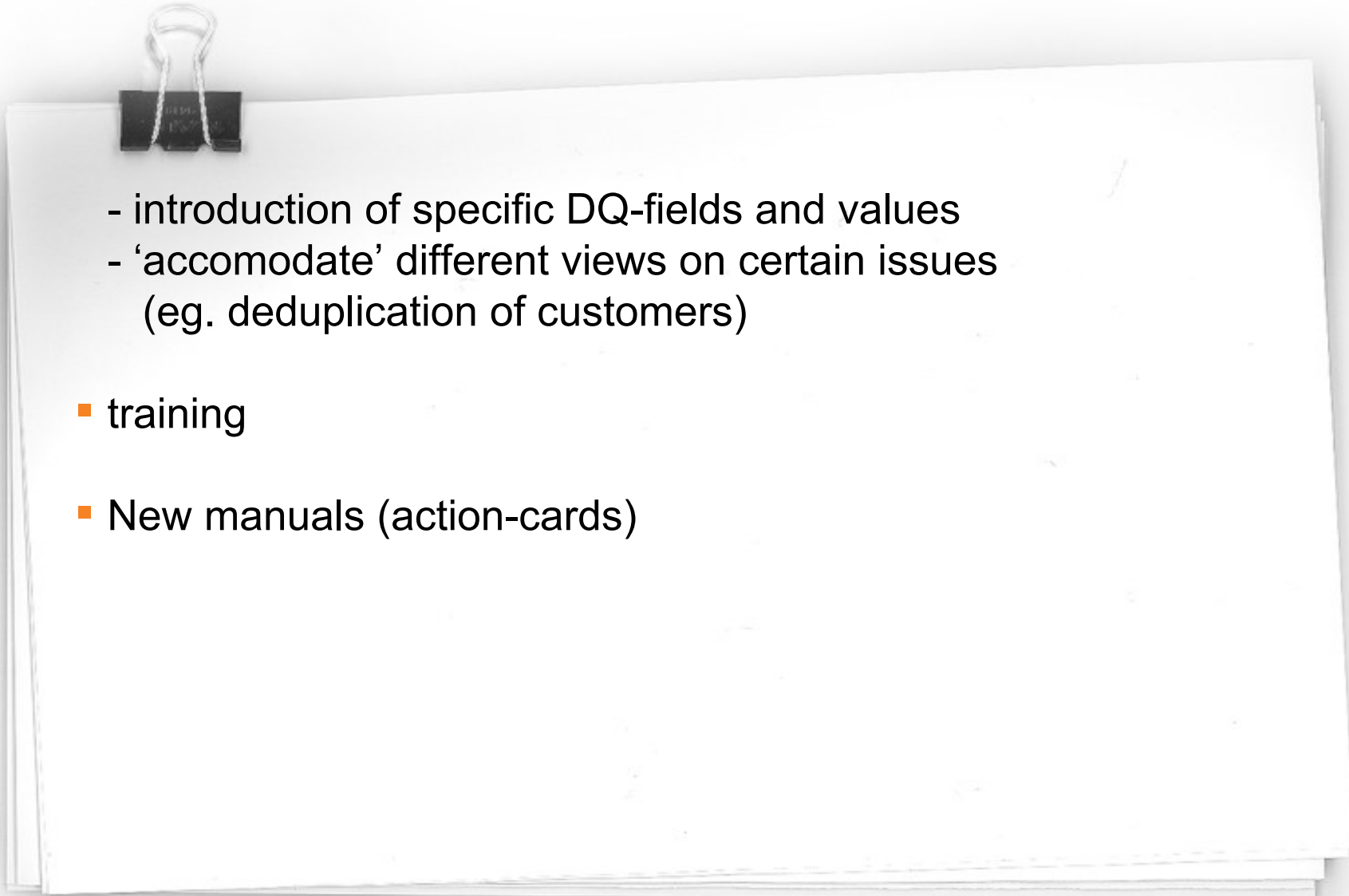


- Master-Slave construction
- All changes via BDP-database with link to Palm
- DQ uploads remained in Palm with link to BDP
- Immediate DQ-action for customers present in both DB's

Issues during migration

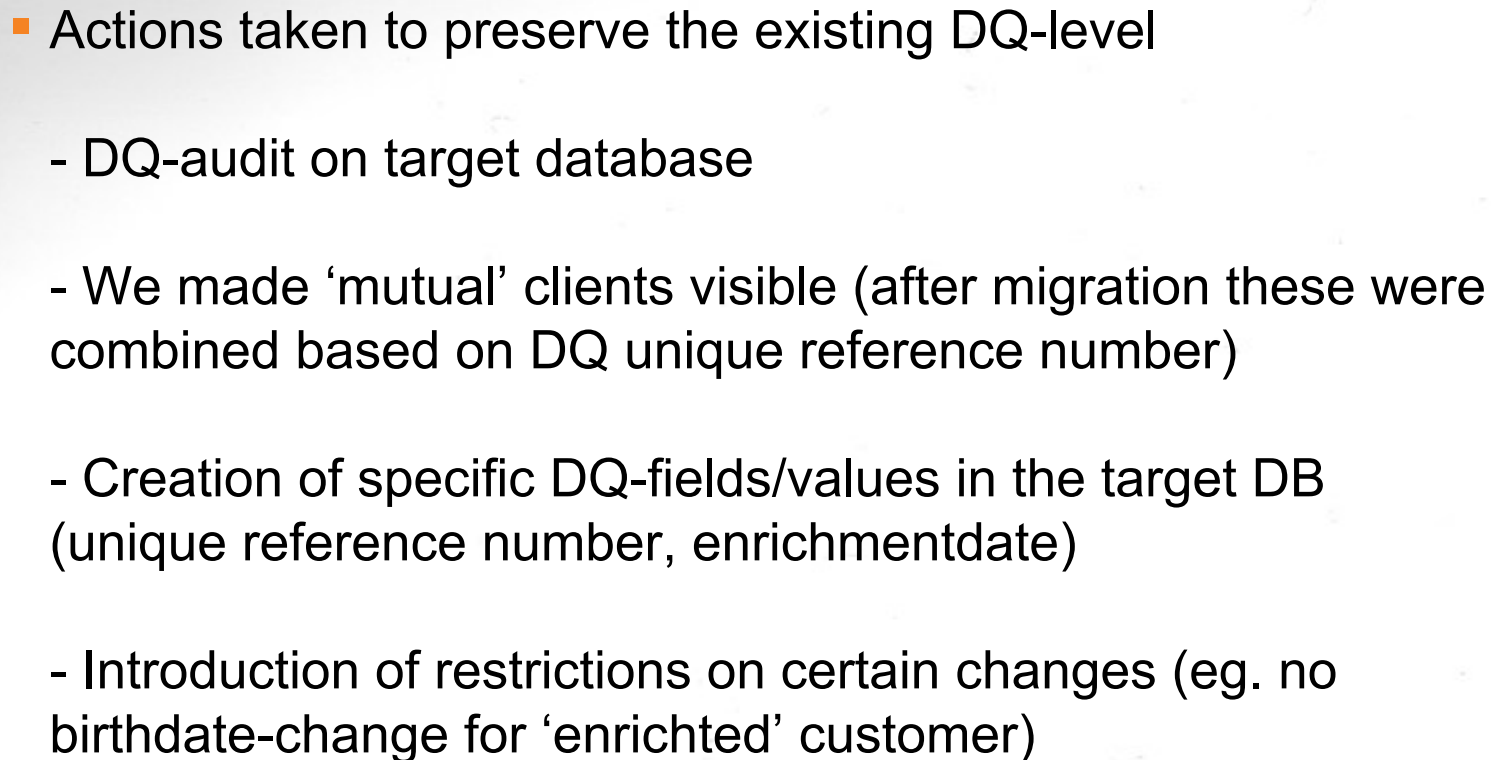
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- Timing
 - Preserving the DQ level
 - Keeping the upload and control processes in place
 - Not 'simply' migrate – but realise some first adaptations to the VIVIUM/BDP database
 - new fields that do not exist in the master DB
eg : social status, official address <> postal address
 - new or different values
eg : language – values N and F became 2 and 1
different values for title, legal form

Issues during migration

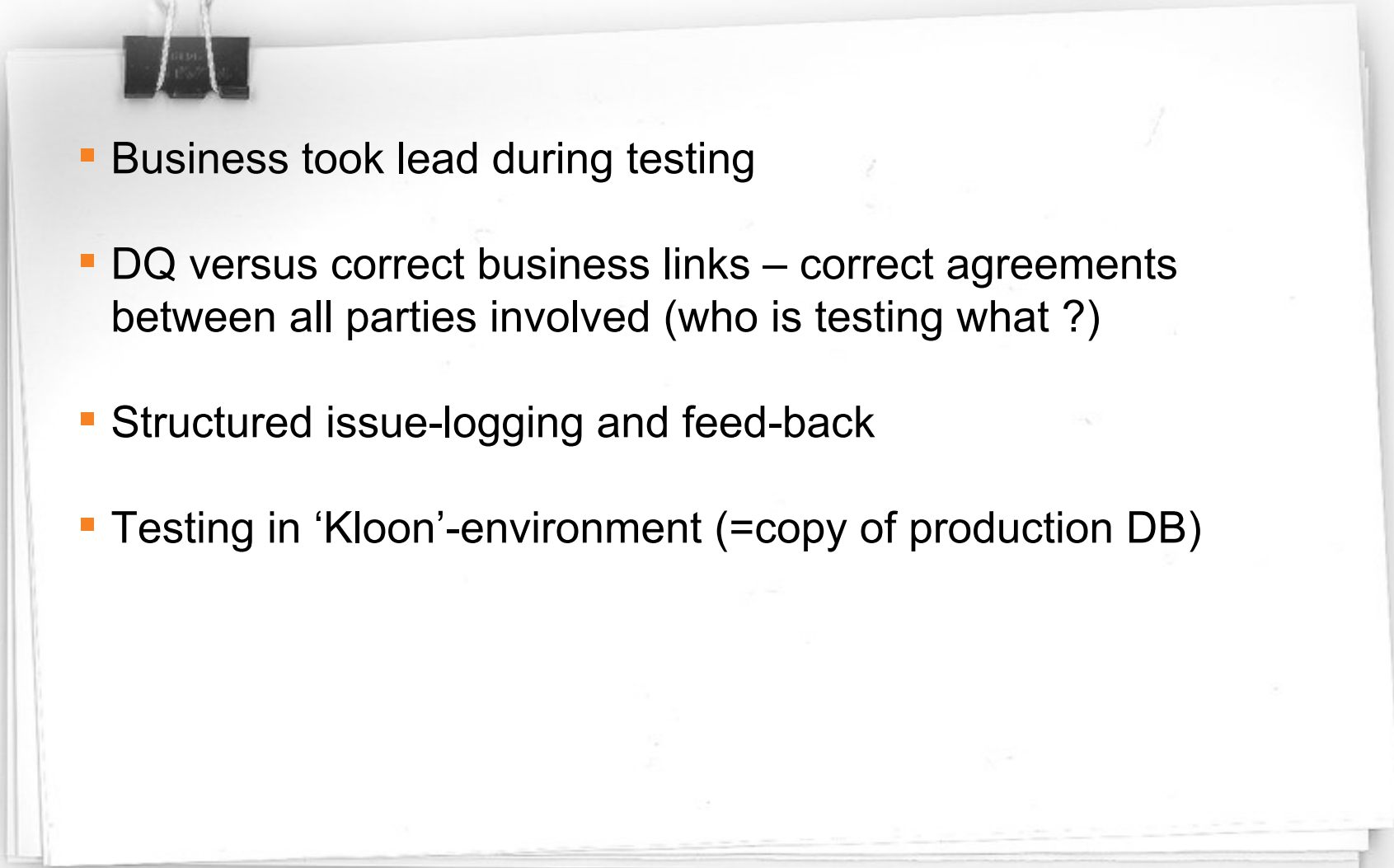
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- introduction of specific DQ-fields and values
 - 'accomodate' different views on certain issues (eg. deduplication of customers)

- training
- New manuals (action-cards)

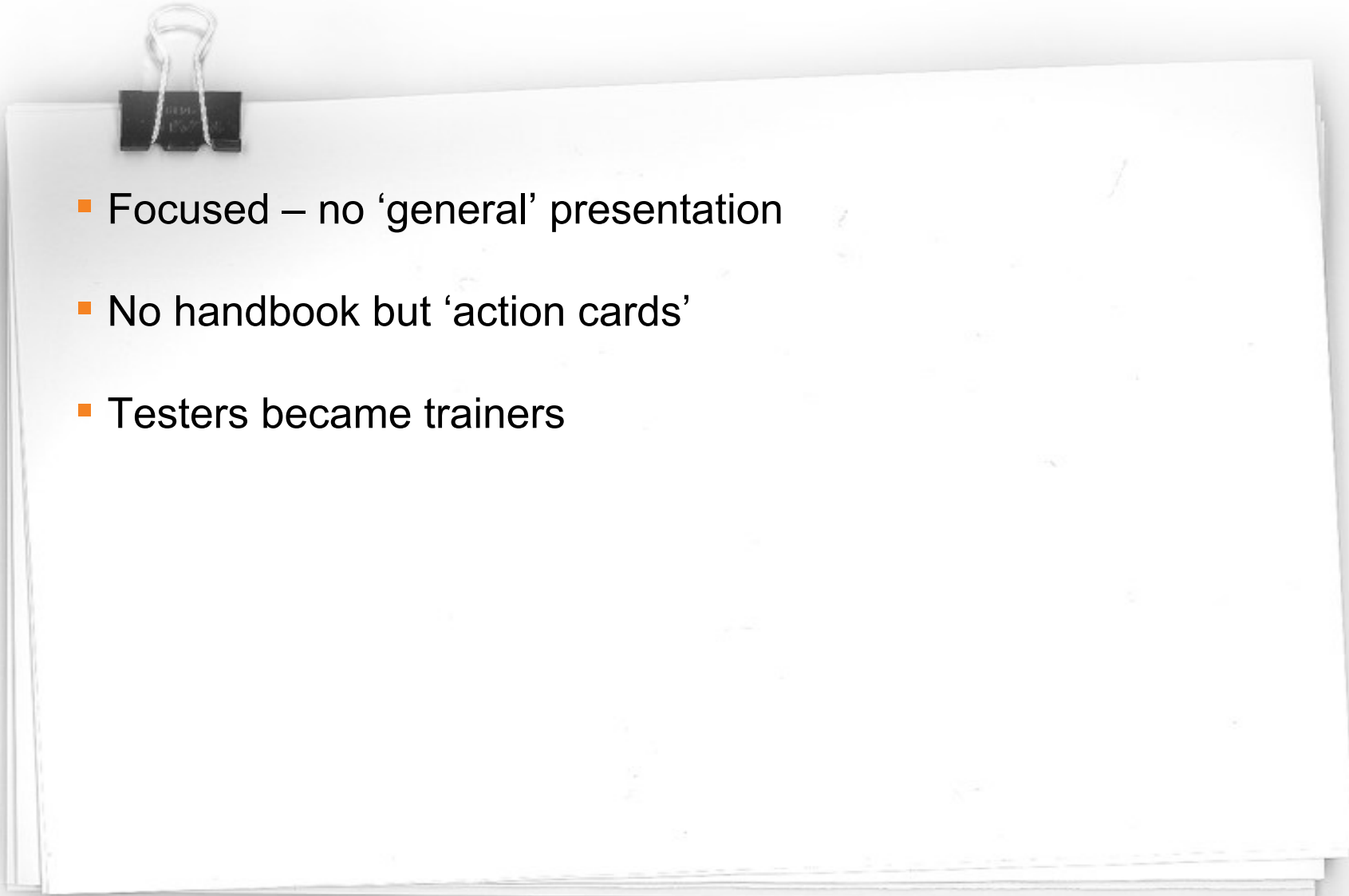
Preserving the DQ level

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- Actions taken to preserve the existing DQ-level
 - DQ-audit on target database
 - We made 'mutual' clients visible (after migration these were combined based on DQ unique reference number)
 - Creation of specific DQ-fields/values in the target DB (unique reference number, enrichmentdate)
 - Introduction of restrictions on certain changes (eg. no birthdate-change for 'enriched' customer)

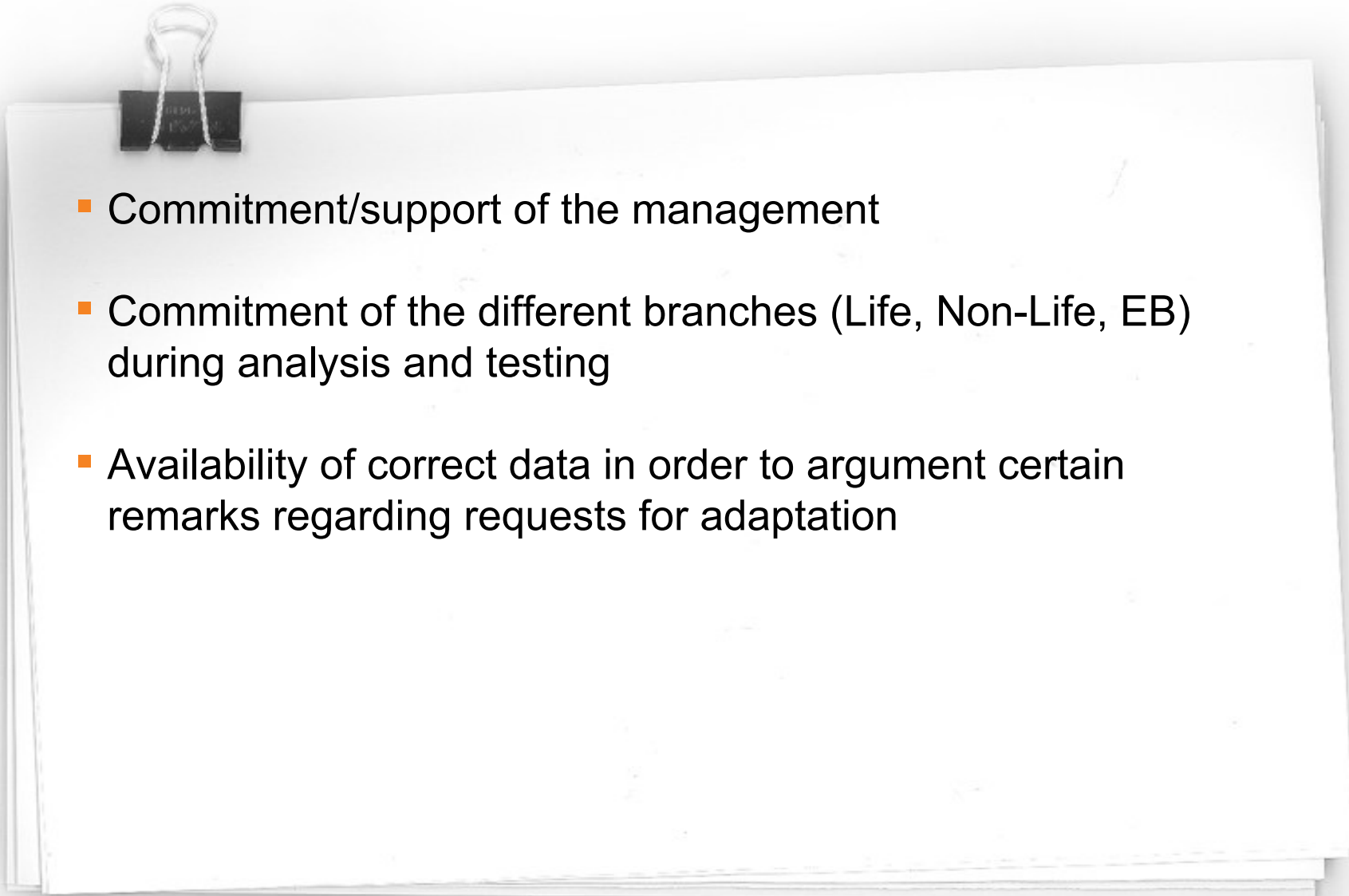
Preparing/Testing

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- Business took lead during testing
 - DQ versus correct business links – correct agreements between all parties involved (who is testing what ?)
 - Structured issue-logging and feed-back
 - Testing in 'Kloon'-environment (=copy of production DB)

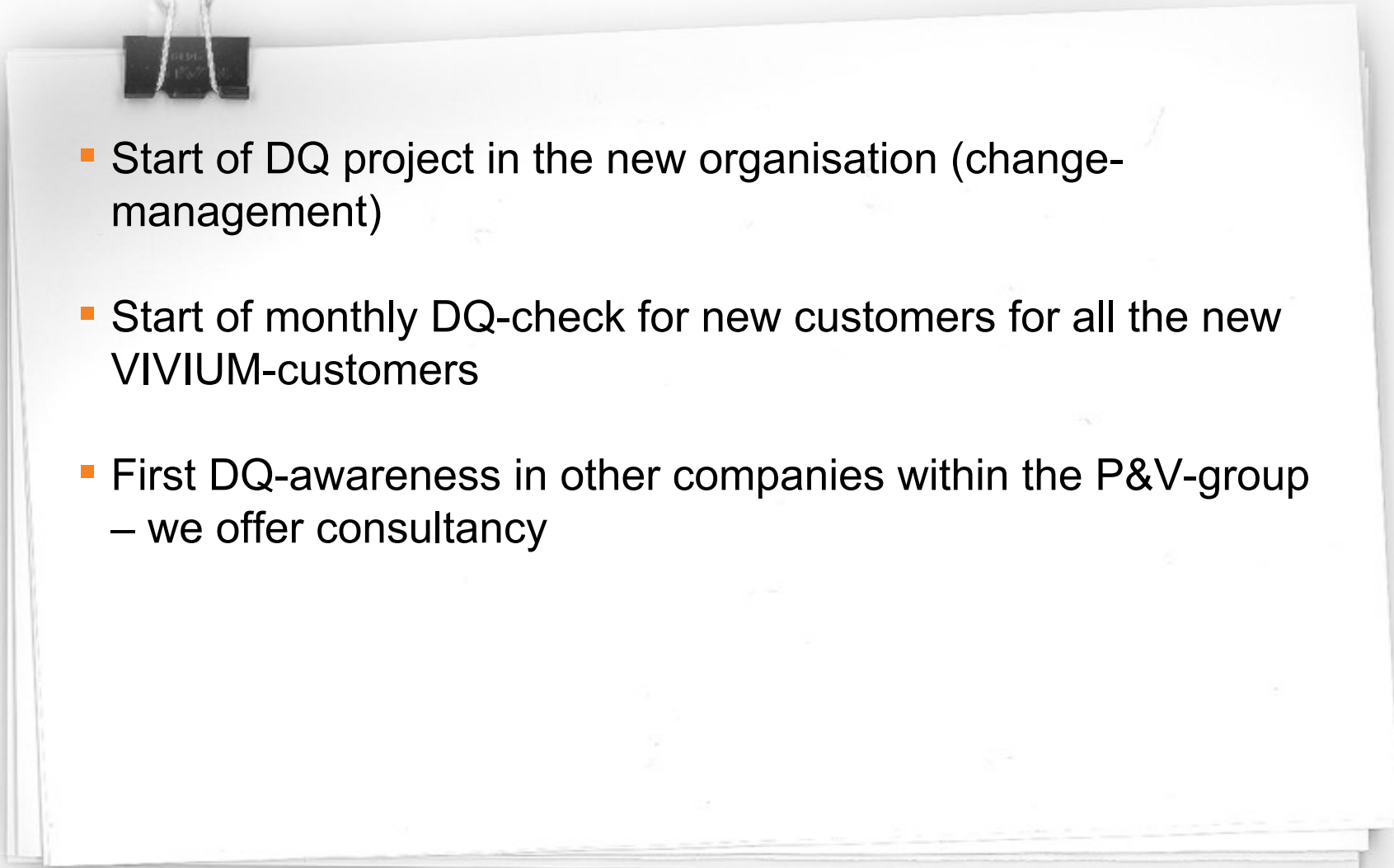
Training

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- Focused – no ‘general’ presentation
 - No handbook but ‘action cards’
 - Testers became trainers

Critical success factors

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- Commitment/support of the management
 - Commitment of the different branches (Life, Non-Life, EB) during analysis and testing
 - Availability of correct data in order to argument certain remarks regarding requests for adaptation

Current status – what after implementation ?

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- Start of DQ project in the new organisation (change-management)
 - Start of monthly DQ-check for new customers for all the new VIVIUM-customers
 - First DQ-awareness in other companies within the P&V-group – we offer consultancy