

Dealing with Data Quality Depression

- *By Chris Fritsch, Client Success Consultant and Founder of CLIENTSFirst Consulting*

Nothing can be more frustrating than dealing with data quality. But when it comes to CRM success, there are few things that are more important. While data quality tasks can be a monotonous and mundane job, left 'untreated', a CRM database can rapidly deteriorate into a major headache, causing end users to doubt and distrust the data – and refuse to use the system.

The First Step

The first step in dealing with data quality depression is admitting you have a problem – or lots of them. Your end users are out of control. The number of duplicate records is multiplying exponentially each day. You can't communicate with your contacts because the majority of them have missing or incomplete contact information. Your data standards are non-standard – or nonexistent. The incomplete entries coming into the database from BlackBerrys are getting worse each day. You're even starting to become paranoid that the IT department may actually be part of the conspiracy. (I promise, they are not out to get you). Then suddenly you realize that you have no idea how to deal with international addresses or phone numbers – and you feel you have nowhere to turn.

Left untreated, disastrous database issues like these can really... well... drive you crazy. Fortunately for you, there is a cure.

Recognizing the Signs

Data quality depression has been described as an emotional state characterized by feelings of sadness, despair, and discouragement – often accompanied by a strong desire to bang your head against the wall... repeatedly. For your mental health, early detection of data quality depression is the key and requires that you be aware of the signs or symptoms which may include:

- Difficulty in focusing or concentrating on the same mundane and repetitive tasks for 10 or more hours every day
- A sense of impending doom when turning on the computer to see the exponential explosion of data quality issues
- Feelings of worthlessness caused by ineffective attempts to beg, bribe or otherwise coerce users to comply with firm data quality standards
- Intense frustration with end users who use their BlackBerrys to enter hundreds of new contacts – many with only first names and maybe a mobile phone number or e-mail address
- Dizziness caused by running in circles trying to get correct contact information from assistants

- Energy loss caused by jumping through hoops to try to get the firm's leaders to commit the necessary resources to data quality
- A shooting pain in the hands or wrists caused by merging absurd numbers of duplicate records only to have more take their places
- The feeling that data quality is just a major pain

Symptoms may be mild at first and may improve after consuming large quantities of chocolate or alcohol. However, as the condition worsens, the only hope is to seek a more effective - and permanent - remedy.

Data Quality Diagnosis – Where Does It Hurt?

The potential remedy for your data quality depression will depend upon the underlying cause. To diagnose the cause of your underlying symptoms, you must first assess the situation and figure out exactly where it hurts. Potential data quality pain points may include:

- A lack of adequate staffing to keep up with the data quality issues
- Failure to dedicate adequate resources to data maintenance
- End users and assistants who do not take responsibility for data quality
- Incorrect configuration of your system causing an increase in the number of data quality tickets or tasks
- A lack of formalized training to ensure that end users understand and embrace their data quality responsibilities
- A lack of management support to encourage participation or provide resources or incentives for compliance

Rest assured, all of these underlying issues are quite common and totally treatable - and, once treated, there is a significant likelihood that you will make a complete recovery. The best way to pinpoint your pain is to reach out to a specialist.

The Data Quality Doctor Is In

If you think you may be suffering from data quality depression, it can be helpful to see a specialist such as a CRM success consultant who is familiar with the causes and effects of data quality depression – and who is an expert in prescribing the right remedy for your specific problem.

The diagnosis will often begin with a data quality checkup, which is a complete assessment and analysis of your data quality situation. Your data quality consultant will begin by taking your CRM pulse by meeting with you and other key stakeholders and system users to ask a series of targeted questions designed to get to the heart of the issues. Questions will focus on areas such as end user participation, leadership buy-in, training, communication, planning, resources, technology and other potentially 'sore' subjects.

The consultant can also run tests on your 'system' to diagnose any additional potential problems with things like system configuration, contact categorization, information standardization and list management procedures.

After a complete check-up, your CRM success consultant will then make specific recommendations to help take away your CRM data quality pain.

Just What the Doctor Ordered

While the bad news is that data quality depression may seem to be an epidemic, the good news is that it is treatable – and it's rarely contagious. The treatments for data quality depression vary depending on the symptoms and the causes. As a result, your data quality specialist should diagnose your specific issue in order to prescribe a course of treatment specific to your firm's unique needs.

For instance, if your symptoms include delirium caused by end users who do not seem to follow instructions or take responsibility for their own data maintenance, your data quality consultant may recommend a course of training (also known as a training course.) The focus of the training should be not only therapeutic to alleviate current issues by teaching users to best ways to prevent data quality problems, but also preventative to avoid future relapses by emphasizing the reasons that long-term data maintenance is important to the firm.

On the other hand, if you are presenting with symptoms of stress and fatigue that seem to have been induced by a lack of adequate resources to do your data quality job, the consultant may first work together with you to create a compelling business case to take to firm management to help secure additional monetary or human resources.

If this initial treatment is unsuccessful, another equally effective treatment to consider would be to involve employees in other positions or departments to assist with data quality tasks part-time. Assistants, paralegals, word processors, records personnel, receptionists or even summer interns could be recruited to help prevent the spread or growth of data quality issues.

You should be aware that the selection of individuals responsible for data quality can be challenging and proper screening is crucial. Ideally, good candidates should have excellent attention to detail, a strong work ethic and some institutional knowledge of your firm and Clients. If the right individuals can be identified, their assistance can have an excellent prophylactic effect on future data quality problems.

Alternative Medicine for Data Quality Depression

While most cases of data quality depression often respond positively to one of these treatments, some cases seem to be resistant to these methods. In such cases, we often recommend an alternative therapy. One treatment that has been particularly effective for some firms is outsourcing your data quality.

One solution may be to pay a data quality company to clean and deduplicate your data. During this process, data is typically matched up electronically against a postal database to append and standardize mailing addresses. The output generated is typically a very large spreadsheet of potential duplicate matches, which then must be manually reviewed and validated by someone on your team. After the review, data can be fed back into the CRM for deduplication. The entire process can take weeks or

months and can easily cost tens of thousands of dollars or more. However, if you consider that manually standardizing and deduplicating the same data could sometimes take a full-time data steward almost a year, sometimes the cost and time savings can seem justified.

Alternatively, there are now outsourced professional data stewards you can hire to assist you. These trained data quality professionals serve as members of your firm's data quality team and can work with you on a full-time basis – or just lend a hand part-time when you need additional support during a rollout or to assist with a project. They are knowledgeable about multiple CRM systems and are supervised by consultants or companies who are experts in data quality and CRM success. They will communicate with you on a regular basis and provide regular reports regarding data quality progress.

While these data stewards function as members of your firm's team, because they are outsourced, you won't have to deal with the headaches associated with finding, hiring, firing or supervising them – and the cost can be significantly less than hiring a full-time internal data steward. Ultimately, using these alternative data quality professionals can be an effective and affordable way to reduce your data quality pain – and the return on your investment can be significant.

Dealing With Data Quality Depression – Don't Do It Alone

When it comes to data quality depression, it's important to know that you aren't alone. There are literally hundreds of firms struggling with the same frustrations and issues. Often, the best thing you can do is to reach out for assistance.

Frequently, help is closer than you think. In fact, you can often find relief within your own firm. There are plenty of people with the right skills and, more importantly, some additional bandwidth, who may be able to assist you with recurring data quality tasks. Good potential candidates include secretaries, records clerks, word processors, paralegals or even your receptionist. Having a qualified pool of candidates is important because when it comes to enhancing data quality, the more helping hands – and eyes – the better.

You may also benefit from the ideas and best practices of other firms. You may want to consider joining or creating a data quality "support group." Start a discussion group, arrange meetings or just get together for coffee with people in your area in similar positions who have the same data quality challenges and headaches. Before making a decision about how to address your own firm's data quality issues, find out what has worked for them, as well as what hasn't.

A Growing Problem

Ultimately, at some point, you may realize that getting help for data quality depression is essential. Once a firm reaches a certain size, often around 100 users, a part-time data steward just can't keep up with the volume of data changes in most cases. Larger firms will likely require a full-time data steward. And as a firm reaches the 250 user mark, even one dedicated data steward might not be able to do the job alone.

The reason that data quality resources are necessary is that, no matter what you do, keeping up with data changes from hundreds of CRM users is a challenging – and never-ending – job. One reason is that an estimated 25 to 30 percent of CRM data degrades each year. Think about it, people move, get promoted, change companies, get married – and a few even die. This causes a severe symptom: bad data. This can cause a severe reaction in your end users: they stop trusting and using the CRM system.

Additionally, during an initial CRM rollout, having extra data quality resources will be imperative. If you consider that the average attorney has approximately 500 contacts – some senior partners may have thousands while new associates may only have a few – it's not uncommon for a CRM rollout for a firm with 100 attorneys to quickly build a database of over 50,000 records. Of those, conservatively 25 percent or more may be duplicates. That means there could be more than 12,000 records that need to be standardized, cleaned and merged. If you assume that a skilled data steward can deal with about 200 records a day, it could easily take months to get the data in order, assuming you have the resources.

Preventing Data Quality Depression - and Rolodex Rejection

So how big a problem is data quality depression really? In the past, some firms neglected CRM data quality as a minor issue – to their detriment. In fact, poor data quality can become a serious problem, especially during an initial rollout because the attorneys can quickly lose confidence in the system if the data is a mess. After all, attorneys are trained to find fault – and when they do, they may jump to the conclusion that if the data is bad, the system is not trustworthy. Then adoption and usage will stall.

Additionally, until the data is properly cleaned and deduplicated, the value of your CRM cannot be fully recognized. Until the entire firm is rolled out, the attorneys can't leverage relationship intelligence to identify 'who knows who' relationships. Until comprehensive contact information is collected and compiled and contacts are categorized (now that's alliteration), it's almost impossible to accurately distribute mailings, invitations or other communications.

As a result, the longer the data cleanup process takes, the more marketing and business development opportunities are lost – and the more time and money are wasted. So ultimately, if you don't focus on data quality, you could end up with what many firms refer to their CRM system as: a glorified, overpriced Rolodex.

Get Help...Somewhere

So what do you do if you feel like you are drowning in CRM data quality problems and you just can't seem to get help? Remember, while data quality depression can be serious, you don't have to face it alone. Reach out to colleagues, peers or industry organizations for help.

You can also contact a CRM Success Consultant to provide you with information, ideas and best practices. At ClientsFirst, you can call us anytime for data quality assistance or outsourced data quality professionals. We are here to help. But even if you don't get help for data quality depression from a CRM Success consultant, get help... somewhere.

About the Author

As a CRM and Client Success consultant and the founder of CLIENTSFirst Consulting, Chris Fritsch helps Clients successfully select and implement the right technology solutions to support their business development efforts and maximize adoption and return on investment.