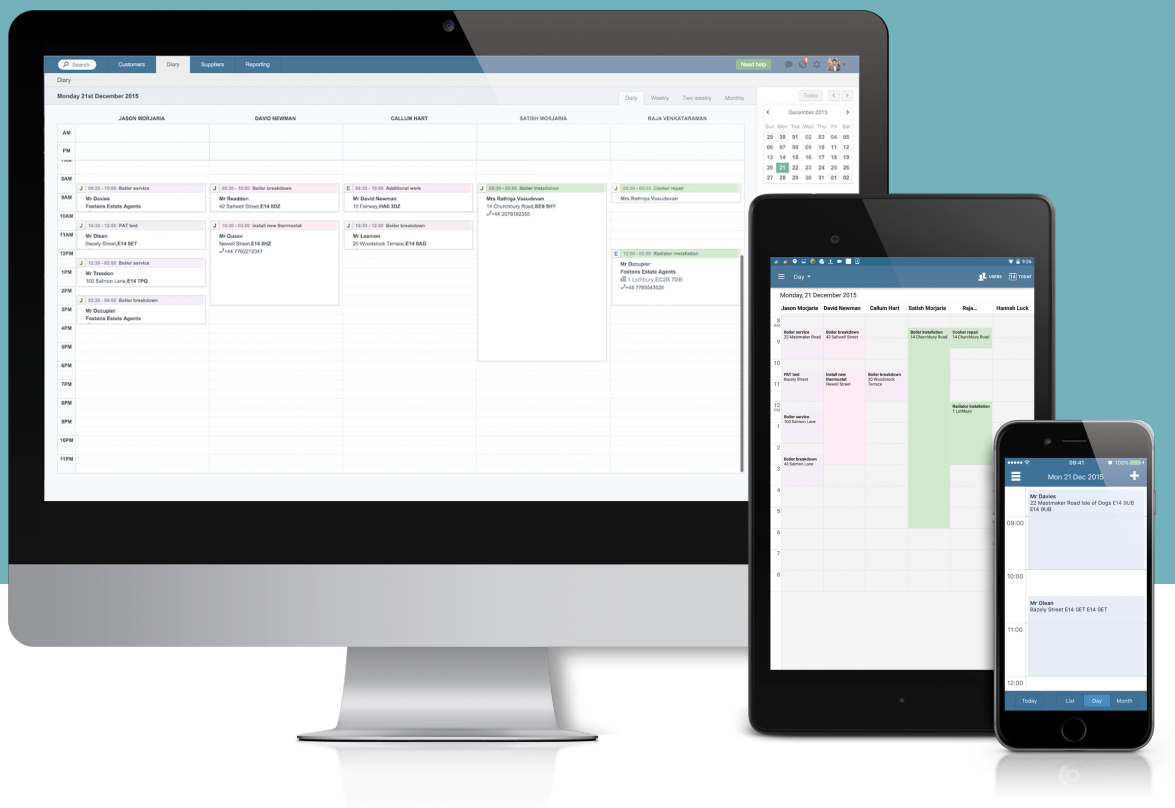
How to maintain it

by commusoft



Make gathering information a habit

Now that the system is installed we come to possibly the most important point of all. Important, because it will determine the success of your customer database, the return on your investment. It is also important because it might involve something of a change not just in technology but in company culture.

You need to communicate to your team that gathering information is part of their job. A day-to-day duty. This applies to everyone, whether it is an office person taking calls, a finance person creating invoices or an engineer working onsite. Information needs to be captured and it needs to be accurate and kept up-to-date. **No ifs, no buts, no exceptions**. That may sound daunting but after a while it just becomes a good habit.

This is where the wisdom of your choice of software and partner will truly reveal itself. If the customer database and the apps associated with it are easy to use, your employees will be more than happy to use it, as it will be a lot simpler than filling in manual reports or entering information into a spreadsheet.

The key is to gather as much useful information about customers as possible. And not just textual information. For example, assuming that your customer database is accessible from mobile devices with supported apps, your engineers can for example upload photographs of boilers and other installed equipment, access points etc., as well as electronic (e.g. pdf) documents such as safety certificates.

On the other hand, note the word useful. You must decide on what information is "critical", what information is "good to have" and what information is "irrelevant". When considering what is "irrelevant" you should also bear in mind that customers might regard it as intrusive. Some companies collect a lot of irrelevant data. Their teams enter so much that they lose track of exactly what is important. This is less likely to be the case if you have chosen a customer database that is specific to your business.

Critical data

Name, address details, other contact details. Note which is the customer's preferred means of getting in contact (email, SMS, post or other). Details of appliances. Plus, category of customer, e.g. business or residential, owner-dweller, tenant or landlord. This information is essential for providing a good service. It is also necessary for performing basic segmentation of the data for promotional purposes: for example, some campaigns are appropriate to landlords and owner-dwellers but not tenants; other campaigns will be appropriate for businesses but not for residential customers.

Good to have data

Under this heading comes data that helps with your interactions with customers and service visits (e.g. details about the process for getting access to the property) or which may help you to segment your database more precisely for marketing purposes (e.g. it may be useful to have a record of the presence of children in a residential household). By the way, if you want to use this information for segmenting purposes, you will need some standard fields for data entry, so think about this when setting up the database.

Under this heading comes any information that will help you to up-sell or cross-sell or to communicate more effectively. For example, if it's a business customer: what sector or line of business are they in?

Perhaps the most important "good to have data" – you might even consider it critical – from a marketing perspective is an indication of how you got the customer's business. Over time this will help you to determine what is the best method for acquiring new customers and this will make your promotional activity even more cost-effective.

Irrelevant data

If you invest in a customer database that is specific to your business, i.e. a plumbing, gas, oil heating or electrical company, this should not be a problem. More general packages might have fields for things like consumer preferences, values, religion etc. In most cases this is not relevant to you and the customer would find it rather odd and perhaps even intrusive if you asked for it!

Understand the meaning of data quality

An old mantra of database administrators is "garbage in, garbage out". Faulty or out-of-date information can be worse than no information at all. Again, you can build this into your work processes. For example, when your admin staff call or email a customer they should take the opportunity to check that the information in the database is correct and current. It only takes a moment, whereas sending an invoice to the wrong address can result in wasted effort, or sending it to the wrong person can cause embarrassment and damage customer relationships. Other sources of poor data quality can be duplicate records, which can occur, for example, if a householder's name is entered incorrectly, changes name etc.

It is worth investing a little time and effort to identify duplicates and merge them. Of course, it is even better to avoid the problem in the first place so your staff should not be shy about getting customers to spell out their names and addresses etc. very clearly when speaking to them on the telephone.

One way of periodically improving the completeness and accuracy of data is to get your customers to do it for you! Send out a communication by the customer's preferred means (typically email) and ask them to correct any mistakes or add information. You can do this as part of a promotional campaign, e.g. by offering a small discount for services carried out within a certain time period (typically your quiet period, probably during the summer).

Establish some rules for data entry

To ensure consistency, you need to communicate to your team the importance of entering information in the right formats. This starts with simply being careful. For example, if entering data that has been first recorded by hand, don't simply guess your way through bad handwriting. A computer can detect certain types of errors, but it is never going to know that Mr. Harman should be Mr. Hamman! And once it is wrongly entered into the system, it may be difficult to correct.

In addition to communicating to staff the need to be careful and diligent when entering data, you should establish some rules for data entry. For example, when do you use capital letters and when not?

Do you insert the name in full, including middle name, or just first name plus initial, or just first name? What do you do if there are two co-tenants with different surnames who share an appliance? What should and should not go in the first address line (if you have a house name in some and a street in others, this could lead to problems). Simple things like adding a space or a full stop after a name may make it difficult to search for information.

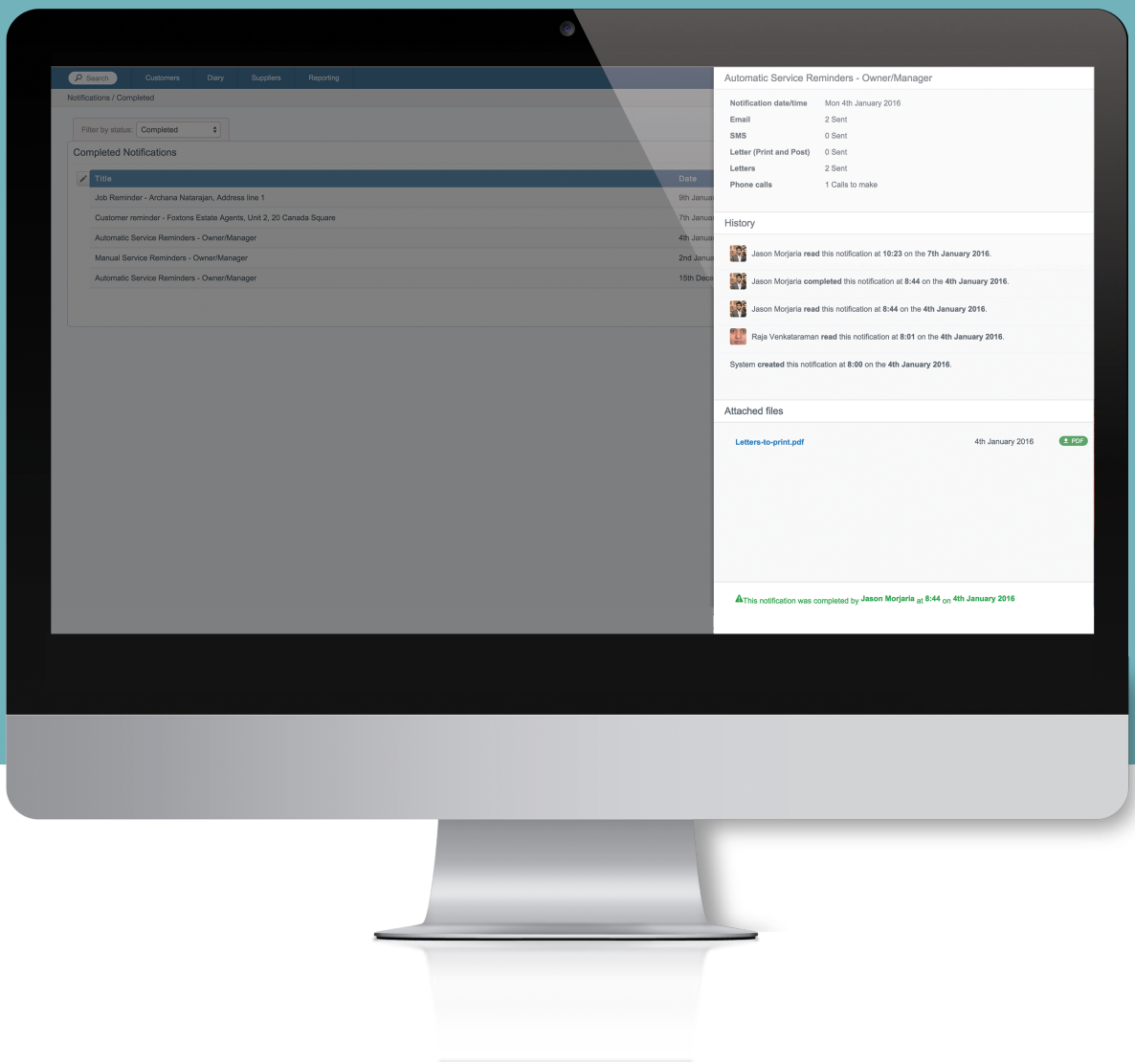
Getting things wrong can not only cause unnecessary administrative problems, they can also damage customer relationships or your professional reputation. We've all experienced receiving wrongly or badly addressed mailings.

On the positive side, correct data entry enhances your flexibility when creating mailing campaigns. For example, if you want to target a campaign by postcode or by telephone area code, it is important to have these entered in a consistent format. (Even in this day and age when we are all used to computers, it is surprising how many people confuse O (the letter) with 0 (zero) when entering a value!)

A common data entry problem is handling missing values. Users may assign the same blank value to various types of missing values. When "blank" is not allowed, users often enter meaningless value substitutes. Default values in data entry forms are often left untouched. The first entry in any list box is selected more often than any other entry. This can lead to problems. For example, supposing you have a data entry item for "Type of Boiler". If the system is set up wrong, or users are not properly instructed, this could end up with an engineer turning up on the customer's doorstep with parts for the wrong type of appliance.

Well-designed data entry forms and instructions eliminate or mitigate a lot of data entry problems: fields are labelled and organised clearly, data entry repetitions are eliminated, and data is not required when it is not yet available or is already forgotten. The reality of data entry, however, is not that rosy (and probably won't be for years to come). Thus we must accept that manual data entry will inevitably lead to occasional mistakes – but good processes and working habits reduce these to the minimum.

Remember also that your software partner should be in a position to offer advice on best practice when it comes to data entry. They will have come up against the same issues hundreds of times before!



Data cleansing

The process of looking for, and correcting, errors in data is known as "data cleansing". There are some tools that can automate the process (for example, generating lists of records that are near-matches and might therefore be duplicates). In fact, however, computer specialists argue that, unless you have some very powerful tools, data cleansing can end up making the data even dirtier. (Think of it like continually mixing coloureds and whites in the washing machine … eventually they all end up the same shade of dirty grey!)

First, you should encourage your regular staff to correct any mistakes they identify as they find them. Second, you might consider employing a student or other casual worker to go through your database for a few hours (or whatever it takes) to check that street addresses etc. are spelled correctly and consistently.

Company mergers & acquisitions

If at any point your business takes over or merges with another company, make it a priority to merge your customer databases. Working off two systems will cause problems, whereas working off of one system is an opportunity to reduce admin overheads and create efficiencies.

Look at the two systems and decide which is the best option. This could involve making some compromises but it is likely that you will be able to implement some of the best features of both in the new integrated customer database.

Establish a customer privacy policy

If you are collecting and storing a lot of customer data, you need to stay within the legal framework.

This has been a little unclear for some time but an EU Directive entered into force on 5 May 2016 and EU Member States are required to make it national law by 6 May 2018 (this is likely to be the case whatever the UK's future status inside or outside the EU).

In a nutshell, this states that information can only be gathered for legitimate business purposes with the consent of the customer. You can find details here. In the meantime it is a good idea to draw up your own data privacy statement, publish it on your company website and communicate it to your customers. Your software partner or consultant can help you with this or you can easily find examples of privacy statements on company websites. Make sure that your staff understand the importance of protecting the privacy and confidentiality of customer data.

Bottom line: if you have a clear privacy statement and abide by it, people will be less inclined to withhold data.

About the author

Jason Morjaria is the founder of Commusoft.

Commusoft develops integrated software packages that meet the specific needs of plumbing, gas, heating, electrical and similar service companies.

The software covers customer databases, engineers' and office diary, estimates, job management, invoicing, certificates, service reminders, parts management etc. together with management reporting and integration to all widely used accounting software packages.

Based in London, UK, the company has 45 employees and 750 clients in the United Kingdom.

For more information visit **www.commusoft.co.uk**, phone 0203 0266 266 or just click below.

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