HP Customer Relationship Management (CRM)

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Agenda

- CRM at HP

- Completeness

- Duplication

- Results

- Lessons learned

- Questions?

www.theodora.com/maps

The HP Universe

www.theodora.com/maps

244 ISO Countries

59 HP Organizations

6 Siebel Instances

3 Business Regions

1 Standard for CRM Metrics

	Completeness	Duplication
Account	Measure 26 fields Metric based on 10	Site within Instance
Contact	Measure 15 Metric based on 7	Intra Site Inter Site within Instance

Completeness

Account

Account
Nb rec
ACCOUNT Name
AMID (Acct ID) NAME
PRIMARY_ADDR1
PRIMARY_ADDR2
PRIMARY_ADDR3
PRIMARY_CITY
PRIMARY_STATE_PROVINCE
PRIMARY_POSTALCD
PRIMARY_COUNTRY
CID_SITE
CID_SUBSITE
MAIN_PHONE
HP_CUSTOMER_SEGMENT
PRIMARY_BU_CUSTOMER_SEGMENT
AMID_CLASS_CODE
INDUSTRY_SEGMENT
INDUSTRY_VERTICAL
EMPLOYEES_AT_SITE
TOTAL_EMPLOYEES
TOTAL_EMPLOYEES_CUST_SUPPLIED
PRIMARY_INDUSTRY_CODE
PREFERRED_CURRENCY
HARTE_HANKS_ID
_DUNS_SITE_NO
_AMID_COUNTRY_ID

Contact

Contact
Nb rec
FIRST_NAME
LAST_NAME
PROFESSIONAL_TITLE
ACCOUNT
WORK_PHONE
WORK_FAX
BUSINESS_FUNCTION
JOB_ROLE
JOB_TITLE
EMAIL
PERSONAL_CID
PERMISSION eMail
PERMISSION Phone
PERMISSION Mail

Publish - Number as R/Y/G for Ent and SMB by Instance and by Region

Calculate – Subset of fields are used – all with equal weight with the exception of State (only NA) and AMID (only Enterprise accounts)
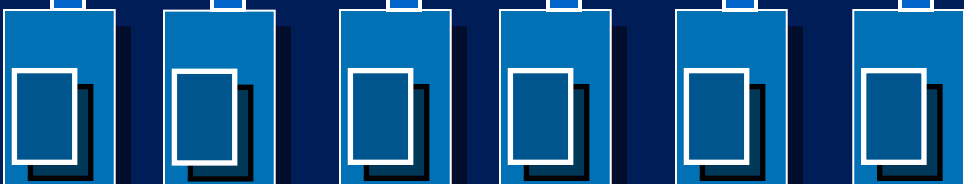
Measure all fields for content

Edits by field on content and field length – I.e. postal code = 00000 is considered blank

Each field is measured and grouped by HP organization, Instance and Region and is available for drill down.

Transformation - Remove CR , Inactive, Marked for Deletion, Pure Parnters

Contact records marked for permissions

Data extracted monthly from all 6 Siebel Instances

Duplication

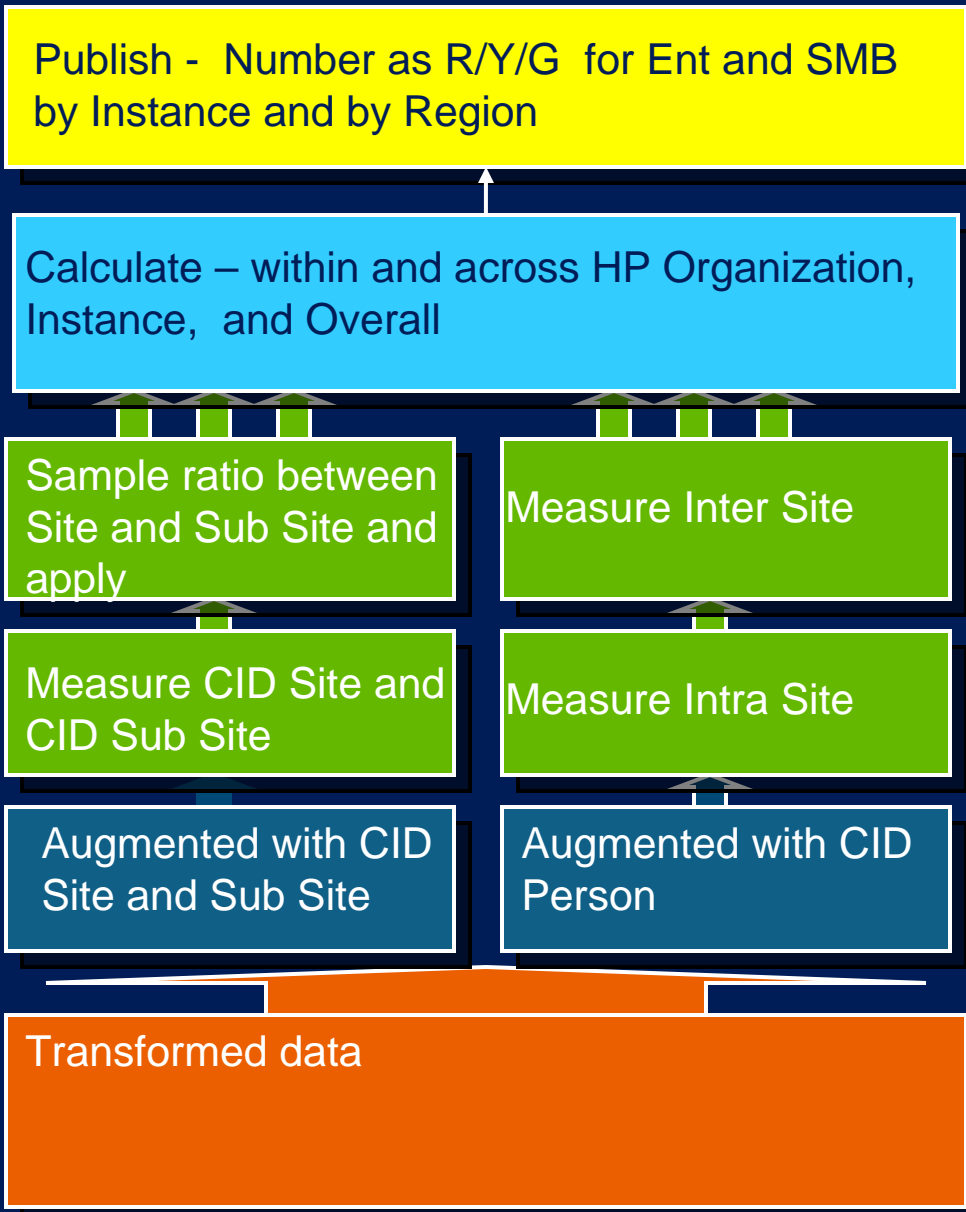**Account**

Contact

CID Site – A persistent ID that identifies like names at like addresses

CID Sub Site – In conjunction with the Site ID identifies a particular department or shipping location

Publish - Number as R/Y/G for Ent and SMB by Instance and by Region

Calculate – within and across HP Organization, Instance, and Overall

Sample ratio between Site and Sub Site and apply

Measure Inter Site

Measure CID Site and CID Sub Site

Measure Intra Site

Augmented with CID Site and Sub Site

Augmented with CID Person

Transformed data

CID Person – A persistent ID that identifies a person

Results

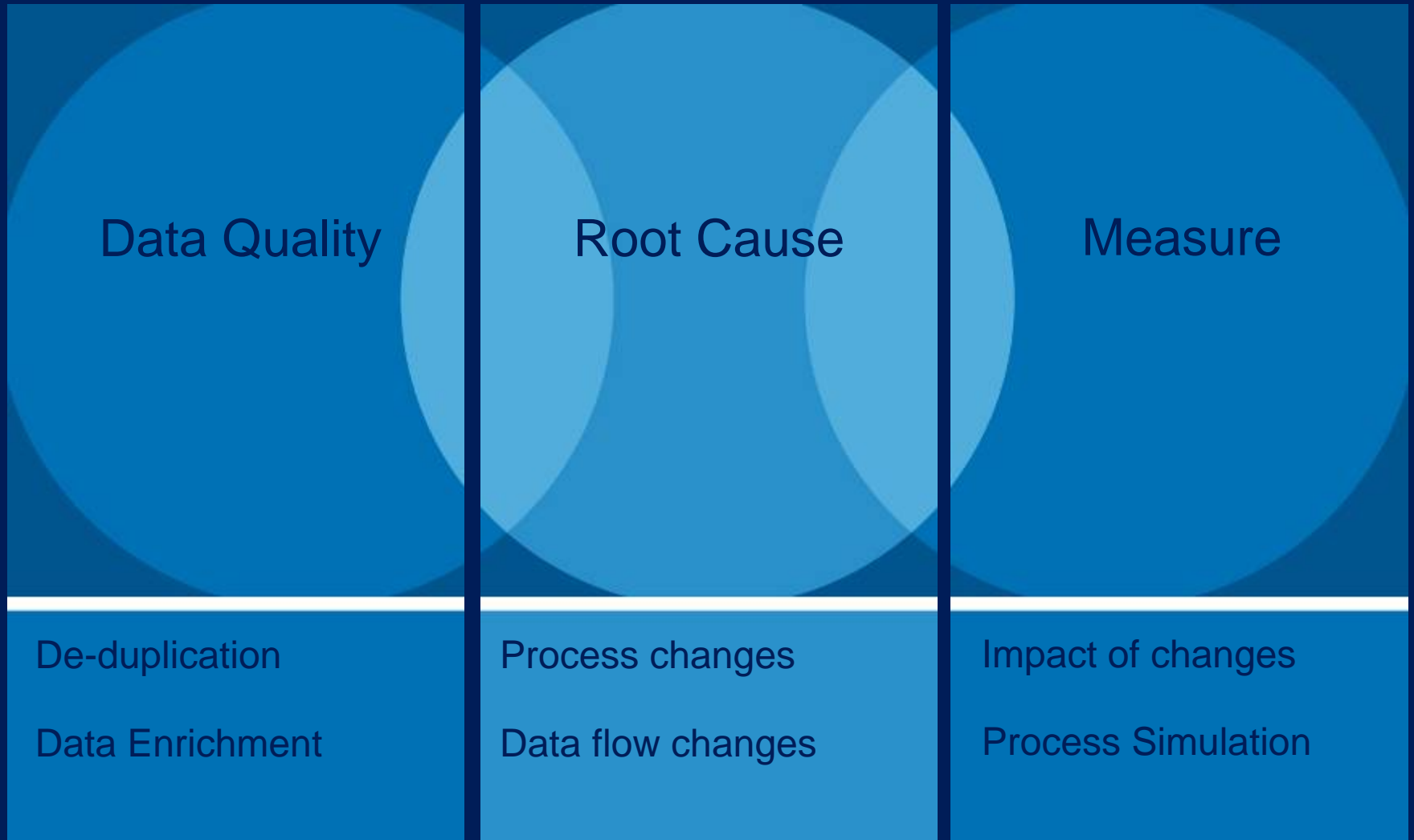| By Month	Enterprise	SMB
Region 1	%	%
Region 2	%	%
Region 3	%	%

Ability to drill down by Instance, HP organization, to the data element across Enterprise, SMB, other and total by month to understand best practices and where improvements are needed.

Information

HP CRM - Provide an industry-leading customer experience through connected processes and a single view of the customer across inside sales, outside sales, and marketing.

Actions Taken – Lessons Learned

Data Quality	Root Cause	Measure
De-duplication	Process changes	Impact of changes
Data Enrichment	Data flow changes	Process Simulation

Questions?