FEATURE

Five Steps to Ensure the Success of Your Database

[By Wes Trochlil]

Every year, businesses collectively invest millions of dollars to upgrade their current database systems or to buy brand-new systems. Yet it seems that the more money we invest in our databases, the louder the protests are from staff complaining that the database just doesn't work. How can this be?

There are five steps you can take to ensure that your database lives up to the expectations of its users. By addressing each of these areas, business executives and those responsible for businesses' databases can help to minimize complaining from staff and maximize the usefulness of the databases.

Step #1: Review, refine and re-engineer business processes-Today's increasingly sophisticated relational databases offer a myriad of functions: sales-force automation, customer-relationship management, financial transactions, enterprise-resource planning, and so on. One element common to all is process.

We define process as how information moves through the business and through the database. For example, we process a product order by reviewing the order form, entering the key data elements, creating an invoice, entering payment against the invoice, printing a packing slip, fulfilling and shipping the order, and so on.

When contemplating a new database or an upgrade, completely review your business processes. This will help you determine if you have inefficient or improper (or just plain outdated) procedures in place. Discuss these processes with your business-software developer. Your developer has created the software to handle each process in a particular manner. This may differ from yours. Find out what it is, and if you can adapt your process to fit more closely what the developer had in mind without sacrificing your business practice, do it. This may require some fairly radical changes to how you do business internally but in the long run will help to make the database more useful.

The primary danger of implementing a new database without reviewing your business process is that you may wind up automating bad process. Bad process automated will continue to give you the wrong information, only faster than before. Don't do it. (In addition, if bad process is causing your database to function improperly, you can bet the staff will blame the software.)

Step #2: Develop proper training and documentation-These two go hand in hand and are perhaps the issues most commonly complained about by business executives. Once a review of the business process is complete and the installation or upgrade has begun, training and documentation become vital. Unfortunately, business-software providers are able to provide only generalized documentation and training for their systems. Neither their training nor their documentation will be specific to your particular database and its special elements. This is where you need a specialist on the inside.

Some businesses are now creating full-time positions such as a data records administrators or database coordinators. The position is responsible for providing documentation and training for the database. From processing new orders, to changing customer information, to simply changing an email address, this position is responsible for providing step-by-step instructions for each of the processes.

If a full-time position is not possible, consider using part-time help. You may also want to contract with a database consultant. Have the consultant learn your processes and your database and then work with staff to document processes and develop training materials.

Step #3: Develop and rigidly adhere to data standards-You may have heard the term GIGO: garbage in, garbage out. Simply put, this means that if the information you store in your database is not entered accurately or uniformly, no amount of reporting, consulting, or crying is going to give you the information you need. This is where data standards come into play.

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At one small business, we spent many months working with key database users developing a set of standards by which to enter all data. Not only do the data standards state explicitly how to enter data (e.g., Street, not St.; PO, not P.O.; etc.), but they also clearly explain where to enter data and what fields must absolutely be entered in order for a record to be complete.

Standardizing data entry is critical for developing useful and accurate management reports. Without strict standards, sorting of data can become difficult, if not impossible. For example, without clearly defined standards for titles, selecting and sorting on the title of vice president quickly becomes impossible due to the myriad variations of this title (Vice President, VP, V.P., Vice Pres., etc.). With a data-entry standard that clearly states that one enters the title vice president as "Vice President," selecting on this title now becomes very easy. The same will be true of any other data fields you may choose to select or sort on.

Step #4: Continuously collect data-The old saying goes, the minute a directory is printed, it's already out of date. The same is true for business databases. Depending on the industry or profession you serve, the addresses in your database may change as frequently as 5% per month. Over the course of the year, with no updating being done, you could have a database with over 50% incorrect information! So how do you keep up? Build data collection into the process.

Develop a laundry list of methods, both passive and active, for collecting data to update your database. Some of the more obvious data collection mechanisms are order forms, product registration forms, and allowing your customers to review their contact information online at your website. Some less-obvious processes include training your customer service representatives to always confirm contact data when speaking to customers on the phone or using a third-party data-processing company to scrub your data using phone, email, and snail mail to contact customers to confirm their data.

Data is gold to any business. Keep your gold shining by actively and continuously seeking to update your data.

Step #5: Know what you need and want from your database-Too often, businesses select a database system based on what it is capable of doing, rather than on whether it does what the business needs it to do. Understanding what you need from your database is not only key in the selection of your database but is essential to its continued effectiveness.

Typically, there are several functions that a database needs to provide: contact management (address, phone, fax, email), product tracking and invoicing, inventory management, and more. But what are some of the other items you need to track now or may need to track in the future? How about purchasing history or customer areas of interests? All of these issues require the collection of data. If you're not collecting it, you can't report it out, and you have to know you want to report it out to begin collecting it.

Understanding what your needs are now and anticipating what your needs may be in the future can go a long way toward creating an effective database. Be sure that you understand your needs and can articulate them to your software provider.

Being successful with your customer database requires active, not passive, management. Applying these five steps will help you have a more successful database.

About the Author

Wes Trochlil is president of Effective Database Management, LLC in Hamilton, VA. For more than 17 years, Wes has been helping businesses move their data management from a cost center to a revenue generator. Wes has written for and been quoted in SearchSMB.com, *eWeek, Executive Update*, and many other magazines and appeared as an expert on CRM issues on Microsoft's non-profit TV program. You can reach Wes at wes@effectivedatabase.com or at (540) 338-9404.

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