5 Steps to a Single View

An Experian QAS Tip Sheet

Experian℠
QAS

Creating and Maintaining a Single View

All agencies strive to achieve a single view of their constituents, but most organizations fall short of this goal. The benefits are clear: by linking data across department systems, an organization improves operations, citizen profiling, and records management.

However, before launching a deduplication project, data stewards need perspective from commercial stakeholders, an understanding of the data impacts, and a clear process that takes technology and methodology into account.

This resource outlines 5 steps that help data stewards execute successful deduplication projects. Advice is based on experiences with organizations working through migration, deduping, merging, validation, and standardization projects.

Step 1: Engage stakeholders

Data stewards are not mind readers. They work with finite data and rely on stakeholders to provide insight. Similarly, commercial stakeholders may not understand the intricacies of data integration.

With this in mind, remember to engage users across departments and functions. Each individual brings a unique perspective and list of priorities. More importantly, each person understands the ramifications of change to his or her department.

It's best to start with a larger group to communicate the upcoming project and gain basic feedback.

From there, refine the group to core contributors, those individuals most impacted or those with the most information on data collection and usage patterns.

Step 2: Identify impacts and priorities

Data errors and disparate data prevent stewards from amalgamating records and defining a master database. Therefore, consider all possible impacts and then focus the deduplication project on essential issues.

For example, do employees struggle to find constituent records? Do tax bills, registrations and other mailings lack necessary targeting? Or, do workers overlook valuable information or activity history when reviewing citizen records?

Those are merely a few of the challenges that agencies face as a result of duplicate data.

After scoping the project and selecting strategic priorities, consider what qualifies as a single record. Some require individual entries while others desire household information.

Lastly, prioritize data elements, including name, email, mailing address, and credit card number.

Step 3: Create success criteria

Look for quantifiable metrics related to the strategic priority.

Consider these sample questions:
- What benchmarks exist (example: claims, registrations or bills misrouted, collection rate or dollars lost)?
- How would a single view impact each benchmark?
- How will you track results?
- What constitutes success for this project?

Once success criteria are set, review the project scope. What data needs to be linked and what matching

thresholds are acceptable given the specified objectives?

Matching thresholds should tie all relevant data elements together. By leveraging deduplication technology, organizations score match rates based on business logic.

Step 4: Define new standards

Once stakeholders agree to a deduplication project and set success criteria, define new standards. While matching thresholds are unique to each agency, many consider a score of 85 percent or more to be a positive match.

Records with matching scores below 70 percent are typically considered unique. Data governance routines should target those records that fall within 70 to 85 percent match rates.

Here, rules and routines may be set in order to review the potential match and identify next steps.

Each agency will have a unique design workflow for evaluating and selecting surviving records (also known as "golden records"). This includes reviewing the data elements discussed in step 2 as well as how conflicting data from matching records will be treated.

Finally, set guidelines and processes for merging and purging records.

Step 5: Leverage matching technology

A robust deduplication tool allows organizations to design multiple workflows that handle a variety of matching challenges.

The ideal tool must be pliable and fluid, enabling customizations and strong search capabilities.

Agencies should also consider throughput capabilities. For organizations with disparate databases or high input volumes, find a partner with experience processing high volumes.

Conclusion

Maintaining a holistic view of each constituent is an ongoing process. Data continues to change and it's important to continue to review, match, and merge.

Organizations have historically relied heavily on manual processes because of supposed cost savings and IT resource constraints. Unfortunately, manual error impedes processes. In order to achieve organization success, seek out new tools and processes.

Leverage technology that makes your job easier. These steps offer guidelines for creating and maintaining a single view. With this individual insight, organizations can make data accessible to all and improve results across agencies.

Experian QAS
125 Summer St Ste 1910
Boston, MA 02110-1615

T: 1 888 322 6201
info@qas.com

www.qas.com