Master Data: Managing Internal Customer Expectations with Metrics & Customer Contracts

Jennifer Bauman
Campbell Soup Company
Learning Points

- Overview of Campbells Master Data and FASS
- Chicken or the Egg?
- Our journey with metrics- The good, the bad, the really ugly!
- Why bother with CRM Contracts?
- What’s next?
Who Am I?

- Jennifer Bauman, MBA, PMP
- Manager, CRM Master Data at Campbell Soup Company
  - 3 years in Master Data
  - 4 ½ years implementing SAP; Business Intelligence
  - 3 years Customer & Financial Reporting, Supply Chain
- Prior to Campbells worked in consulting for Arthur Andersen
- Project Management Professional
- Data driven
- Process optimization
Finance and Accounting Shared Services (FASS)

Transaction Processing Director
Accounting Services Director
Customer Financial Services
Fixed Assets
Accounts Payable
General Accounting
System Services
Cost Accounting
Payroll Services

Master Data
eCommerce Director
Angel Sasso

Master Data
ECommerce

Financial Policies and Controls Director
Financial Policies and Procedures
SAP Security and Controls
Financial Controls and Compliance

Real Experience. Real Advantage.
Master Data Organization
Campbell’s SAP Environment

- One instance of SAP
- Master data maintained in transactional system
  - No MDM solution
- No data quality tool for master data
- No workflow tool for master data
- Master data requests received via lotus notes
Campbell’s Master Data Organization

Director, MDeC
Angel Sasso

Manager, CRM & Finance
Jennifer Bauman

- Customer
- Pricing/Promotion
- Finance

Manager, SCM
Conrad Rebello

- Vendor
- Direct Materials
- Indirect Materials

Sr Manager, eCommerce
Diane Simpson

- Data Sync
- EDI
Chicken or the Egg?

Metrics or CRM Contracts- Which first?

- Do what you can do
- Anything is better than nothing
Key Responsibilities:

- Governance & Organization – Ensure MD adheres to Global Framework & Data Standards
- Processes & Services – Performs MD Adds, Change, Deletes, serves as a Information Resource and provides consultative services as necessary
- Quality Management – Data Quality / Controls
Why Metrics?

- *We know we are good but now we can prove it to you*
- Manage Resources
- Where is our work coming from
- Identify additional training needed: Data Quality
- Identify process improvement areas
- Work more collaboratively with our customers.....

CRM Contracts
The good, the bad, the really ugly

- Mostly standard forms
- Global list of requestors and approvers
- Defined roles & responsibilities within MD team
- Well-defined documented processes & procedures
The good, **the bad,** the really ugly

- No workflow tool
- Manual excel based forms most of the time
- No data quality tool
- Metrics to be tracked in excel manually
- Metrics consolidated manually
The good, the bad, the really ugly

- Change Management- People
  - Manual tracking process
  - How do they see the value of this additional work?
- Iterative process- Hard for those with no patience and who are not good with change
- Errors when manually entering data into the form
Step 1: Determine what to measure

- What are we doing?
- Changes, creates, inquiries, projects
- Who are we doing it for?
- How fast are we doing it?
- How accurately are we doing it?
- Who is sending us rush requests?
Step 2: What is the metric?

- % distribution across creates, changes, inquiries, projects by
  - Employee
  - Requester, Requester dept
  - H-M-L complexity
  - Location

- SLA
- Data Quality *
- % Rush requests by requestor dept
- Incomplete incoming requests/Rejected by requestor dept
### Step 3: Creating the metrics capture form

- Started with 1 guinea pig
- Then to 2 team leaders
- Then to CRM team
- Then to all of MD
# Metrics Evolution

<table>
<thead>
<tr>
<th>Last Name:</th>
<th>Month</th>
<th>Domain</th>
<th>Date Recvd</th>
<th>After Hours (X)</th>
<th>Rush Request (X)</th>
<th>Needed by</th>
<th>Completed on</th>
<th>SLA</th>
<th>Description of Activity</th>
<th>Type</th>
<th>Requestor</th>
</tr>
</thead>
</table>

- **Responsible Party (DQ)**
- **Business Dept**
- **Complete or Incomplete w/Analysis**
- **# objects in request**
- **Errors Found**
- **Complexity (H-M-L)**
- **Mass T. Code (Only if Y)**
- **Business Impact**
Metrics Next Steps

BUILDING A BUSINESS CASE FOR DATA QUALITY AND WORKFLOW

NEEDED TO CRAWL FIRST
Why Metrics?

- We know we are good but now we can prove it to you
- Manage Resources
- Where is our work coming from
- Identify additional training needed: Data Quality
- Identify process improvement areas
- **Work better with our customers….. CRM Contracts**
CRM… It Starts With Our Mission

Together we will deliver world class financial transaction and data processing quality and service for our customers while continuously improving.

Transaction Processing ◆ Accounting Services ◆ Master Data & eCommerce ◆ Financial Policies & Controls
What does World Class mean in the Marketplace?

World Class Shared Services

- High performance work teams
- High degree of integrated software solutions
- Continuous improvement program embedded within processes
- **Formal relationship agreement with Customers**
- Established performance measurement process
Why have CRM Contracts?

- Best practice in world class organizations
- Increase understanding of expectations and dependencies between FASS and its Customers
- Provide a framework for performance measurement and process improvements
- Build joint accountability
- Improve communications
Examples

Are your goals aligned?

*Example: Procurement*

Who else is in “the process”?

*Example: “Master data has long SLA’s?*
CRM Testimonial

"The FASS / Procurement Relationship Contract has enabled a mutual understanding of the responsibilities and expectations of both organizations. Global Procurement has effectively leveraged key metrics provided by Vendor Master Data to ensure that the financial obligations to Campbell's suppliers and vendors are fulfilled in a timely and accurate manner."

~ J. Patrick McCloud
Group Director, Global Procurement Excellence
The FASS Relationship Contract defines the mutual responsibilities and expectations between FASS and its Customer.

1. **Services Definition**
   - Description of services, frequency & contacts

2. **Customer Responsibilities**
   - Customer Inputs / Performance dependencies

3. **Service Level Performance**
   - Service Level Metrics (Output)
   - Reverse SLA (Input)

4. **Issue and Request Resolution**
   - Issue & Request Categorization
   - Escalation procedures

5. **Meeting plan**
   - Review SLA metrics
   - Share AOP & Strat plans

What will we do for you?

What will we need from you?

How do we know it’s working?

How do we resolve issues?

How do we maintain ongoing dialogue?
Starts with a Service Definition Schedule & Formal Agreement
What is included?

- Service Grid
- Performance Mgmt (Metrics)
- Contract
- Issues Mgmt
- Customer Update Meetings
Performance Measurement: Back to Metrics

- FASS formed a metrics team in late F08 which is made up of representatives from each process area.
- Service level metrics and reverse SLAs should be reviewed at least quarterly once Relationship Contract is in effect.
- Satisfaction survey will be conducted at least annually beginning F10.
What’s in it for the customer?

- Improve responsiveness to issues and requests
- Improve communications – less surprises
- Identify strengths and improvement opportunities through metrics reviews

Customer Satisfaction
Implementation Checklist

Customer Relationship Management (CRM)
Implementation Checklist

1. Planning & Preparation (Month 1)

- Schedule a 2-hour kick off meeting with the Customer and the FASS teams that have interaction with (see CRM Implementation Plan.xls – customer matrix). Consider scheduling a room with an easel for flip charts.
- Send Customer the FASS Overview deck and request that an overview (i.e., org. structure, primary responsibilities & activities) of the customer organization be prepared and shared at the kick off meeting
- Send Customer the Service Definition Schedule and request that customer provide the following:
  1) A list of services (deliverables and activities) that FASS provides to them
  2) A list of deliverables that FASS receives from the Customer to enable the delivery of the services ~ Reverse SLAs
- Modify the FASS CRM Overview deck to incorporate specific customer feedback, if available from The LAB results
- Coordinate the completion of the Service Definition Schedule by all involved FASS teams to include all services provided to and received from the Customer
II. Kick Off Meeting (Month 2)

- Host kick off meeting
- Distribute meeting minutes and reminder to complete the **Service Definition** Schedule, if needed.
- Schedule follow up meeting

III. Relationship Contract Development (Month 3 & 4)

- Review Service Definitions and Reverse SLAs and ensure details are captured and agreed upon
- Determine measure of success: Service Level Metrics and Targets
- Determine how issues/requests should be escalated
- Establish a Meeting Plan
  * May need multiple meetings for above tasks
- Schedule meeting to review Relationship Contract draft

IV. Relationship Contract Review (Month 5)

- Draft review
- Gain agreement of contract terms and sign off
- Publish Relationship Contract to the CRM team members

V. Relationship Contract In Effect (Month 6)

- Work with Metrics Team to design and develop requirements for the Service Level Metrics identified in the contract
- Schedule meetings according to Meeting Plan
Lessons Learned

- Be patient
- Start small
- Engage your team
- Celebrate the small wins
- Steal with pride!
“Communication works for those who work at it”

Jennifer_Bauman@CampbellSoup.com
Linked In: Bauman.Jennifer@hotmail.com
856.968.5856
Thank you for participating.

Please remember to complete and return your evaluation form following this session.

For ongoing education on this area of focus, visit the Year-Round Community page at www.asug.com/ycr