Executing a Successful Data Conversion

As companies prepare to implement state of the art systems in their supply chain organizations, they tend to overlook what really drives their business: The Data.

Converting data from one source to the next isn't always as simple as extracting, transforming, and loading. The process can be quite cumbersome and time consuming. The data doesn't always come from a single source. It may actually come from multiple sources across a large enterprise. Whatever the case, many companies realize too late that they will need to develop special tools or processes to convert the data to the new system. Without a solid data conversion plan, a system implementation can be delayed unnecessarily. Inaccurate data can have a dangerous ripple effect throughout the entire organization.

To help mitigate the risk of a poorly executed data conversion, there must be ample planning. By executing the following steps, an organization can improve their chances of eliminating most risk and resolving issues that may arise during execution.

1. Allow enough time - Plan
2. Examine all of the data elements
3. Determine the data sources
4. Obtain management buy-in
5. Cleanse data
6. Analyze and Test
7. Load and Go

Allow for the Time - Plan

The planning process is crucial to executing a successful conversion. Before beginning to look at the data, an organization must outline the steps that will be necessary at the time of cutover. This process can be very lengthy depending on the scope of the project. Data conversion should not be an afterthought during an implementation. It should be front and center with the new application that is being implemented. Organizations should take the time to truly understand the new data model and determine how the data will be affected.

Look at All of the Data Elements

Before an organization can transfer existing data to a new system, they must first identify the critical data elements that must be available in order for the system to run properly. A good start is to compare the existing data model to the new data model. Every system has a different data model and data structure. Therefore, naming conventions of certain critical data elements could be different depending on the two systems. This must be a cooperative effort between those associates who are familiar with the old system and the new system.

Determine the Data Sources

In warehouse management systems, data can come from a number of sources inside the organization. These systems include order management systems, procurement systems, enterprise host systems, or transportation systems. While some businesses run primarily from a single ERP package, most companies have an integrated suite of different applications from different vendors. It is critical during the early stages of conversion planning that these sources are identified in order for the data to be analyzed appropriately.

Obtain Management Buy-In

Implementing a new system can be a daunting task. In large, highly centralized companies, management buy-in is absolutely essential. Companies are very protective of their data and typically will require that the appropriate executives have signed off on the project in order to cooperate. To make things easier, the team responsible for the new system should include management from all departments providing data to the new system. Involving management early will signal that you are all unified and that the success of the project is contingent upon everyone's cooperation.

Cleanse Data

After all the data sources have been determined and the data elements hashed out, it becomes necessary to cleanse as much data as possible. Many systems get clouded with data through the years that only takes up valuable space on the database. Organizations should spend time on their existing data to reduce duplicates, errors, and invalid data. If a company's data is poor, it should not propagate it through other systems. Poor data quality can affect an entire organization and the entire supply chain. To determine the potential dangers of poor data quality, the team should conduct a data quality assessment to document the risks of having poor data and to ensure there are no surprises. After identifying the potential risks, a company can determine if it is a large enough risk and whether or not to purchase software tools to clean up the database.

Analyze

Analyzing and testing data prior to a data conversion can be time consuming, but it is absolutely critical that the data being loaded is reliable and that the system can operate. Therefore, a company should have multiple testing efforts where actual production data is loaded to the new system during the system or integration test phases. After this data is loaded into a test environment, the data should be analyzed and validated. This effort can be labor intensive, but it is a way to ensure confidence in the data on the new system.

Load and Go

Most software vendors provide proprietary tools that convert data from one source to the next. While using these tools is a common approach, organizations need to make sure that it's truly the most effective tool for their organization. Some of these tools are very difficult to use and may not be the right choice for a specific data conversion. The best approach would be to take everything into consideration, including third party conversion tools that may offer a faster, more reliable solution. Once the right tool has been selected, the team is ready to convert to the new system. After all of the steps above have been taken, a company can load data and be confident that their new system is providing accurate information.

SUMMARY

An organization's data is almost as critical to a company as the people that run the company. Without quality data, an organization can subject itself to a number of problems. Converting and protecting the integrity of data from one system to the next is not as easy as flipping a switch. It involves a planned and focused effort among many departments within an organization that must be coordinated effectively. Having the right plan, analysis, tools, and support for a conversion will lead to increased confidence and success for a system implementation.

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