Customer Records Workgroup Topics

# Overview

Our goal is to develop guidance and best practices for agencies to analyze and manage legacy customer record data in preparation for implementation of Florida PALM. Through discussions and comparison of agency practices and needs, the group will:

* Identify and discuss current practices and state of legacy data;
* Develop and share expectations, tools, and guidance for analyzing and cleansing legacy data; and
* Provide input for creating or updating policies and best practices to support standardization of data and processes in Florida PALM.

Participants are asked to evaluate your agency for questions related to legacy data, data management, and future state expectations.

# Legacy Data

What types of customer records does your agency record today?

What information does your agency capture within the customer record?

Does your agency manage customer records directly in FLAIR or through an agency business system?

How do you assign each customer’s identification number?

Is there information within the customer records that your agency must capture? Example, do you use customer records to distinguish a specific location of a customer who has multiple location.

Did your agency identify in critical dependencies or learn important information on customer records during your PAWS sessions or Task 324 analysis?

# Data Management

Has your agency started analyzing legacy customer data?

What data cleansing procedures does your agency currently use for the cleaning up your customer records?

What is the frequency at which your agency reviews and manages customer data?

What are common data issues for customer records?

How does your agency plan to identify customer records that will continue to be needed once in Florida PALM?

What are your agency’s concerns for the readiness of your customer records for use in Florida PALM?

What lessons have you learned through other projects (object code standardization) that could be applied here?

What tools or assistance is needed for your agency to analyze customer records more effectively in the future?

What best practices could we share with all agencies for managing customer data?

# Future State

What are standard practices that should be used across agencies for managing customer records, and what differences in practices are appropriate to maintain flexible business processes among agencies?

What existing policies are helpful?

Where are there current policy gaps?

What assumptions do we have about customer records conversion?