

Process Standardization

The Customer Master Data Process



Summary

A global technology manufacturing organization set out to improve customer experience related to the collection of customer master data. Investigations by Scheer Americas revealed that multiple departments were independently requesting the same data from customers, such as billing address, customer name, and shipping address, because the organization lacked standardization and centralized ownership. This fragmented approach led to widespread inconsistencies and degradation across databases, worsened by thousands of employees accessing and entering data without clear governance. These issues triggered operational errors such as misrouted shipments and incorrect billing, directly impacting customer experience.

By following the Business Process Management (BPM) discipline, Scheer Americas helped the organization in successfully innovating and centralizing its customer master data processes—significantly improving data accuracy, streamlining data handling, and elevating overall customer experience.

Organization Background

The organization is a prominent global leader in the manufacturing industry, specializing in advanced aerospace components for both commercial and military applications. With over

100 years of experience, they bring deep industry knowledge and a strong track record of innovation. They have adopted Lean methodology to drive continuous improvement and are further strengthening their operational excellence by embracing BPM and leveraging a centralized process repository. Based in the US, the organization has built strong partnerships with leading manufacturers worldwide, expanding their global reach and amplifying their offerings.

Business Challenge

Scheer Americas investigated the organization's customer master data process and uncovered significant obstacles impacting customer satisfaction. The process lacked standardized, leading multiple departments to repeatedly request the same information from customers. Each department entered data into their respective databases, resulting in duplicate entries, outdated records, and inconsistent information. With no clear data ownership and thousands of employees having access, data was constantly being entered and updated without oversight. This fragmentation caused operational issues—such as shipments sent to the wrong addresses and billing errors—ultimately undermining the customer experience. A fundamental change was needed to improve data accuracy, streamline processes, and restore trust.

The Solution

The departments that requested the most customer data - Sales, Services, and Supply Chain/Finance - were selected to document their existing (As-Is) processes to identify gaps and opportunities for standardization and harmonization. Scheer IDS Americas interviewed Subject Matter Experts (SMEs) and modeled 20 unique processes across the three departments in the process repository. This analysis revealed significant overlaps and variations among the processes.

Scheer IDS Americas then facilitated a cross-departmental workshop where teams collaboratively identified inefficiencies, pain points, and improvement opportunities in their processes. During these discussions, the group quickly recognized the need to establish a centralized department responsible for managing customer data requests and dissemination.

Following the workshop discussions, Scheer IDS Americas designed and modeled a streamlined future-state (To-Be) process architecture led by the newly formed Customer Master Data Team. In the To-Be state, 20 fragmented As-is processes were consolidated into just 2 standardized processes: Request for New Customer Data and Request for

Changes to Customer Data. This transformation simplified operations, strengthened data governance, and enabled a more efficient and centralized approach to managing customer data across the organization.

Results

This successful project achieved the following results:

- Established a centralized Customer Master Data Team, creating a single touchpoint for all customer requests.
- Centralized data entry across all organizational systems to ensure data accuracy, consistency, and integrity.
- Reduced data access from thousands of employees to only 100, with plans to narrow further as governance strengthens.
- Eliminated common data quality issues, such as duplications, outdated records, and entry errors, now actively monitored and corrected by the new team.
- Improved customer satisfaction by minimizing redundant request, enhancing billing and shipping accuracy, and building trust through better cross-departmental communication.

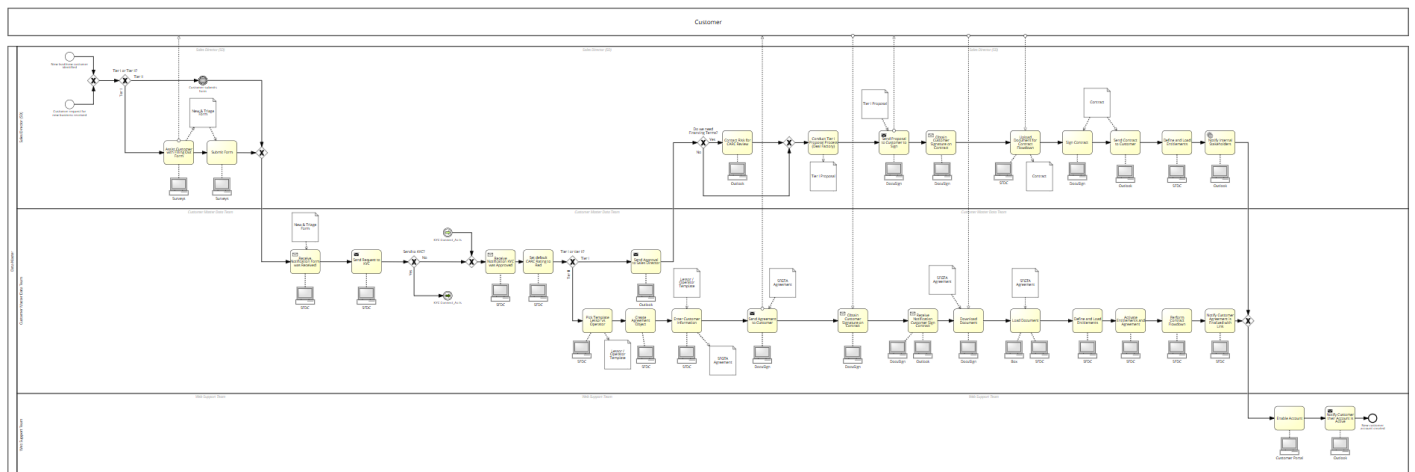


Figure 1: Neutralized version of the To-Be Customer Master Data Process

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