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## Reviews

### **Practical International Data Management: A guide to working with global names and addresses**

*Graham Rhind*

Gower Publishing, 2001; hardback; 171pp; £69.50;  
ISBN 0 566 08405 8

#### **Invaluable**

First and foremost I have to say — reluctantly, in face of the outrageous price set by Gower — that this is an invaluable book. It should be read, and its lessons thoroughly absorbed, by everyone whose business involves the capture, storage, processing and printing of names and addresses (which includes almost everyone likely to be reading this journal); it should sit permanently on the shelves of everyone who has a professional part to play in determining the methodology of such capture, storage, processing and printing. It is short (making the price even more outrageous) and easy to read. But it is at the same time a work of reference of permanent value.

#### **Names and addresses . . .**

The book's main title suggests that it is about the whole of data management; as the subtitle reveals, it is for the most part concerned with the handling of names and addresses. It is, that is to say, about the single most intellectually challenging and intractable problem in the field of data processing. (If you think that is a large claim, try reading the book before you disagree.)

#### **. . . globally**

The fundamental problems of name and address handling can almost all be met with in the context of a UK database. What this book additionally reveals is how expansion to take in other countries, other languages and other cultures creates an explosion of complexity, making most of our current methods — particularly those based on data collection via the Internet — crude, inadequate and counterproductive.

#### **How much short of perfection?**

The standards suggested by the author will seem to many to be altogether too demanding. There is no shame in settling for less: what is shameful is to have installed a less than perfect system (and perfection, as the author would agree, is in principle impossible) without first understanding the ways in which, and the extent to which, it falls short. The careful reader of this book will finish with a clear understanding of the full scope of the global name and address problem and how much of it to deal with. What short cuts to take will then be a matter of rational calculation, rather than the accidental result, as so often now, of carelessness, chauvinism and ignorance.

#### **Some disagreements . . .**

The book is not without fault. The author's subject has four component parts — data capture, data storage, data processing and data output or printing. He chooses to approach the subject first from the standpoint of the database — that is to say from data storage, and it is from this perspective that the bulk of his book is written.

There are two alternative approaches, either of which might seem superior. Either one could approach the four components in the logical sequence in which they are listed above, making life somewhat easier for

the uninstructed reader. Alternatively, one could begin with the function which is the most complex of the four — data processing, the problems of which majorly dictate the way in which data must first be captured and stored. (Consider: if our aim were merely to capture, store and print names and addresses, most of the problems discussed in this book would disappear.) It is above all through an understanding of name and address matching that one can recognise the needs that this process imposes on both data collection and data storage.

... on matching ...

In fact matching receives late, and relatively cursory, treatment in Chapter 11 (headed ‘De-duplication’, which is only one function of matching). Nor would the statement that match-code matching ‘checks for identical matches between match codes . . .’ find agreement among practitioners who, as far back as the earliest UK match code of the 1960s, were a good deal more sophisticated than that.

... and database planning

The author also tangles with the vexed question of planning the structure and contents of a database. He holds that ‘A team for planning a database project should consist of a number of users and the people who will build and/or maintain the database.’ With this piece of conventional wisdom I beg to disagree. The team for planning a database project should consist of one person: the analyst responsible for the job. The analyst must begin by reaching a total understanding of the needs of the project’s users — an understanding that the users themselves do not, usually, possess. (A systems analyst who cannot acquire such understanding is not worthy of the name: the solution is to get rid of him, not to buttress him from outside.) Having reached such understanding, the analyst’s tasks are to:

- prepare a first draft of the proposed system;
- circulate to intended users with a clear description of understood needs, and how they are to be met;
- meet users for feedback;
- iterate as many times as necessary, until users agree blueprint;
- convince users the final proposals were their idea in the first place.

Buy it

Do not be put off by these niggles: if you can afford the price, obtain the book. The next database you design will be the better for it.

*Robin Fairlie F IDM*

## Carving Jelly

*Nick Siragher*

Chilton Publishing International, 2001; £39; 181pp; 0 954 02800 7

Do not be put off by the apparently high cover price for what appears to be a slim paperback; and persevere in tracking it down — after failing to locate it in the business section of several leading bookshops in London, Amazon lived up to their promise and I was thumbing through my copy

over breakfast having only placed my order at around 4pm the previous day.

**The CRM process**

At a time when the pundits increasingly warn of the high failure rate in CRM projects, right on cue we have at long last a thoroughly practical guide to the implementation of CRM, written by a director of one of the leading UK consultancies specialising in this field. I can visualise this becoming the process ‘bible’ for those managing CRM programmes and required reading for all those involved from the boardroom downwards.

**A logical structure and a critical path**

What Nick has been able to do is to lay out for us a concise but detailed methodological structure, reflecting the disciplined approach necessary for success in these programmes. The book follows the logical progression from simple descriptions of what CRM comprises, through the issues which management face in implementing the strategy, followed by a step-by-step run-through of the stages in the subsequent project. The need for a disciplined structure within these projects is underlined by the lavish use of diagrams and flow charts throughout the book — a sort of critical path approach which on the one hand will be familiar to any seasoned project manager, but also makes it very easy for anyone involved to understand quickly the key stages in the overall plan and what stage has been reached, and appreciate the dependencies in the programme. The author also clearly describes the key roles that need to be fulfilled within the overall programme, and those played by others in the organisation who are vital to ensuring success in their particular parts of the business.

**IT not the key issue**

Anyone who has managed a CRM programme rapidly realises that the specialist IT is not the key issue — even if it represents such a large part of the overall cost. Nick carefully explains why issues such as process management, data quality, data integration, change management and training etc are so important to the success of the programme, in addition to the other core issues of commitment, culture and organisation structure. In each case, having clearly described the reasons why the issue matters and identified the underlying factors which contribute to the situation, the author provides the reader with ways to develop practical solutions. For example, in the case of business processes, having described why these are so important within CRM, Nick asks, and answers, the vital question ‘Why don’t sales and marketing managers “do” process?’ — reasons to do with the late adoption of technology by these areas of the business; few processes in place to measure performance; and few legal requirements to record the process of selling or marketing. Without being able to map out and understand these processes, CRM becomes an impossible task. To make it clear what is required Nick provides helpful diagrams to illustrate what is meant by a process map.

**Data quality ...**

A further example is data quality. Experience has taught me that this is one of the most critical factors leading to success or failure in CRM projects, but it seems to be one of those issues, possibly like having your first child, where it is extremely difficult to make others appreciate the challenges they will face. Nick goes further:

‘managers wishing to fail at CRM or sabotage a CRM project need

**... the weakest link**

look no further than “Data” to find the *weakest* link in the CRM project’.

One can almost hear Anne Robinson chastising the contestant: ‘*Data quality*, you are the weakest link ...’ Only, in this case, it is the CRM programme that we say goodbye to.

**Training**

The book also deals extensively with the training issues associated with CRM. This is vital, but often overlooked in other books on the topic, and where organisations (and system vendors) underestimate the resources and planning needed. In particular, Nick underlines the need to ensure that employees have the basic keyboard and Microsoft Office skills to use the applications effectively within the business. It is often easy to overlook the importance of building up basic confidence in these core IT applications before the training on the CRM system commences.

**Need for a technology overview, and more on ROI**

There are a few areas where, from experience, CRM teams need more understanding and skills to achieve a successful outcome. In particular, I feel that it would have been useful to include an overview of the technology issues. For example, how to select an appropriate vendor, or vendors if the project as is likely covers a number of technology applications within the overall programme; what the technologies do and how they impact on the business — as this helps structure an effective business case. Also, while the author does cover the topic of ROI at several points in the book, I personally feel that a section pulling this together plus a more detailed discussion of the issues and possible measures to use could have proved worthwhile, as this is an area where organisations often struggle to develop convincing and workable strategies.

However, these are minor criticisms and should not in anyway detract from readers gaining substantial benefit from the text. It would not be difficult to ensure a very effective ROI for investing in this book — it could be the difference between the success and failure for your CRM programme.

*Peter Mouncey F IDM*

**Pocket Internet**

*Sean Geer*

*The Economist* (with Profile Books), third edn, 2001; hardback; 264pp; £10.99; ISBN 1 86197 371 3

**Pocket Marketing**

*The Economist* (with Profile Books), fourth edn, 2001; hardback; 215pp; £10.99; ISBN 1 86197 361 6

Some time ago (Vol. 1, No. 3, to be precise) we reviewed a series of small pocketbooks produced by NTC and crammed with numerically oriented marketing-related information. Here we have two examples of a different

kind of pocketbook (there are another 13 in the full set), designed around words rather than figures, which could be regarded as complementary to the NTC production.

Essays ...

Each book starts with a small collection of short essays on the contemporary scene relating to each book's speciality. These essays are a well-written easy read to while away commuting journey-time without making serious demands on the reader; they are not what these books are principally about.

... but principally a glossary

The meat of each book is an A-to-Z glossary of terms, each clearly, concisely — and often wittily ('The Internet is so big, so powerful and so pointless that for some people it is a complete substitute for life', attributed to Andrew Brown) — defined and explained. Thus the marketing pocketbook's glossary ranges from A Classification of Residential Neighbourhoods through Kotler to Zap, while its Internet cousin goes from @ through Nerd ('a generally pejorative term for someone of above average intelligence but who has poorly developed social skills and is sartorially challenged ...') to Zmodem. Inevitably not all definitions will meet with universal agreement from *aficionados* (older readers may wince on hearing 'Mailing List' defined as 'An E-mail distribution list', while being pleased to see that 'Direct Marketing' is defined as including e-commerce).

Appendices

The marketing pocketbook ends with a dozen appendices listing leading agencies in different countries, leading brands, US business schools, marketing websites and books (these last a mixed bag). The Internet pocketbook ends with appendices on Internet history, a list of acronyms, a series of Internet tips (useful) and recommended websites on a wide range of subjects.

The marketing pocketbook should last you a few years; the Internet pocketbook needs weekly updating — why is it not on the Web?

*Robin Fairlie F IDM*