Guide to importing data

Into your Saas Application

nuvo

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Why data importing should be considered carefully

Uploading file data into web applications can be a challenge. Spreadsheet templates and import errors hold customers back from gaining the true value of software. While the data importing experience is one of the most important steps to achieving a successful customer onboarding process, the topic rarely receives much attention.

Most businesses rely on customer data to function correctly. From prospect data in a CRM system, payroll information in an HR Management system, to inventory-related information in an ERP System — customer data needs to be transported from A to B. Companies need to translate it into their internal “language”, meaning the format they need to use that data.

Different processes require different formatting requirements, which means more work is needed for a data receiver to gain value from that data. This is exactly where friction happens, as many administrative resources are used to create the right file structure. Product and Engineering, as well as Customer Success Teams, are currently struggling with messy spreadsheets to make them workable for their end customers instead of focusing on building the core product.

On the other hand, the end customer is frustrated as spreadsheet templates and import errors make it hard to efficiently gain value from a product. Being forced to download a template to collect data from existing files to paste and reformat them ensures that your customer is not enjoying the onboarding experience.
In short, customer data importing remains a crucial part of every software product that relies on file data. To understand the challenges that need to be addressed to create the ideal onboarding experience for your customers, we interviewed 100 companies across Europe to understand and demonstrate the critical takeaways of data importing. We will also discuss the different steps in the process of collecting and transforming file data into a usable state, the current status of companies regularly working with file data, and the options a company has when deciding whether they want to use an in-house or external solution.

What is data importing?

Data importing is the process of transporting data into a software product. The data itself is collected from other software vendors or simply created during a company's daily operations and stored in formats such as .xlsx, .csv, etc.

Usually, a software requires a specific format to work with that data. The easiest option for businesses right now is using spreadsheet templates, forcing their customers to go through the arduous reformatting process while still leaving the chance that an import error might pop up.

Importing data has several phases, each of which takes time and offers various potential sources of error. Following consultation with customers and different error sources and workflow analyses, we identified six primary data importing phases. Each of these phases involves touchpoints with highly sensitive customer data and should run as smoothly as possible to avoid the negative impact of a poor data import process on the customer and the customer relationship.

01

Convert data & file to usable intermediate format

The most commonly used formats are .csv and .xlsx files but data can be stored in a wide variety of file formats. Even though the most commonly used formats are Excel and CSV files, this does not mean that companies can exchange their data without further preparation. If the required data format is not communicated in advance, this small detail can lead to longer import cycles and the need for more communication, costing companies more time and money.

02

Select file data

After converting the data into the correct file format, the exchange data points must be selected. This can be done manually via drag and drop, by utilizing an import button or by automatically retrieving the data source through prior scheduling.

Experience has shown that trying to keep track of all the relevant points to select them efficiently causes problems for many companies and costs them unnecessary time and effort. This step has the least potential for errors, yet it can quickly become a tedious process if the files are screened manually and are too extensive for all rows and columns to be visible at one glance. Endless scrolling through data sheets is, therefore, usually unavoidable.

03

Table and field mapping

In addition to the target format, the target data model must also match. The existing data points must be mapped from one schema to another. As well as the headings of the individual columns, the units and details of the unique data points must also correspond to the target data model. All these details and possible differences for each data point have a high potential for errors that lead to lengthy communication cycles and slow down the entire import process.

Since the manual effort exceeds the time frame of almost every company, those who can afford it try to develop an in-house importer. However, developing such an importer also costs time, capacity, and money. For this reason, many companies continue to format the data points themselves and sometimes even charge a fee or have them formatted by their customers, despite the high effort involved. This results in many pain points at different levels in this step, especially on the side of the customer support team and the customers.

04

Data cleaning

Data cleaning is the most complex and most challenging step of a data importing process as we now have to look at data on a single entry-level and need to correct that data based on several rules. After all, and this is the fourth step, the data that has been selected and entered into the target data model despite the incorrect format must now usually be cleaned up manually. As simple and tedious as this process is, it has already become an integral part of the import process for many companies and is an indispensable part of the conventional procedure for guaranteeing the quality of the imported data. Companies tend to either employ staff to manually clean files by hand or develop scripts for very specific scenarios to minimize the overall cleaning efforts. Expensive alternatives to this are data hooks and highly-automated processes for data cleansing.

05

Actual import

Real data importing is only possible after the first four time-consuming, costly, and anxiety-inducing steps. The data is transferred to the new target data model as a compressed package (e.g., JSON)

Challenges arising from a bad data importing experience

The process of data importing and migrating data is messy. Between spreadsheet templates, writing custom scripts and implementation services, getting data from one application to another is fraught with problems. Customers, employees, and ultimately, the companies involved all experience major frustration due to inefficient, time-consuming, and overcomplicated processes.

There is a clear connection between customer relations and successful sales activities. Last but not least, customer satisfaction is reflected in the relationship between seller and buyer, which is ultimately decisive for optimizing customer loyalty or the company gets a bad reputation.

Customer Onboarding involves an import process, as many companies rely on the exchange of data to offer their solution. This means that the quality of the solution offered is diminished if it does not work flawlessly due to data being imported in the wrong format. Correcting these errors and the whole process of data exchange drags out the customer onboarding process, increasing the amount of time necessary to see the value. Generally, customer dissatisfaction ultimately manifests itself in many different scenarios, all of which are undesirable and must be avoided if a company wants to be successful.

These include:

Risk of deal cancellation

The data importing experience remains one of the most crucial steps in making sure the client is willing to use a product. Ensuring that the time-to-value equation is as attractive as possible is key to closing the deal.

Cluelessness

Increased need to contact the support team before actually using the product, as a self-service import is not possible after multiple attempts.

In addition to decreasing satisfaction, these things also cause existing customers to look for other solutions or potential customers to look for alternatives that are more highly rated or have better reviews.

Employee side

The negative points on the customer side correlate with the negative points on the vendor side. The long onboarding cycles lead to lower efficiency on the revenue side and lower efficiency regarding internal business milestones, as developers and other employees are busy cleaning up current customer data and making the product usable for their clients.
The customer support team experiences an extremely high volume of requests, pushing them to their time limits.
Customer success managers spend countless hours guiding customers through the import process, often in extended FAQ sections. Losing customers and prospects is what awaits at the end of this unsuccessful customer onboarding and

data importing odyssey.

Build vs. buy

To eliminate the many problems and sources of error associated with importing data, many companies are looking for the most cost/time-effective solutions and, at the same time, the highest quality solution.
However, a choice has to be made: building your custom data import tool or purchasing an existing solution.

Reasons to look for an in-house solution

Probably the most obvious and also rarest situation in which companies (should) decide to build their data importer is when the capacities of the development team are so unused that an in-house importer can be built without any opportunity costs.
This means that neither the core activities of the development team nor other ancillary activities suffer from the high effort of building an in-house solution. A better reason for building an in-house import solution is that the available software solutions are not suitable.
Using our extensive experience, we have identified the following four critical points that lead companies to decide to develop their in-house tool.

It is pretty evident that not all software fits every conceivable import scenario. Often, the target data models require a particular set of rules to ensure data quality. If these rules cannot be customised down to the smallest detail in the external software, creating your solution to ensure data quality can be very reasonable.

Another barrier that many companies face is implementing an external solution in their systems. If the implementation is not user-friendly or does not correspond with the company's frameworks, the entire solution becomes impractical no matter how well it fits the problem. Developing your solution is, thus, often more effective than setting up an interface to make the external solution usable.

Since the data to be imported often comes from external customers and should, therefore, be handled very sensitively, many companies also experience problems finding suitable software that fulfils the need for data sensitivity. Usually, it just doesn't feel right to work with specific providers. In addition, external solutions might process the data in the back-end, and thus, sensitive customer data has to be passed onto third parties for the import solution to work.

Again, this probably leads to not wanting to work with such providers/solutions in the first place and, ultimately, having to develop one's solution, whether it's based on evaluation or their own experience.

Even if these four scenarios are not applicable, an external solution should at least be considered.
Otherwise, opportunity costs tend to be much higher. In the following scenarios, it is most certainly the right way to implement an existing solution instead of struggling with developing a custom solution.

The following situations clearly show that using an external solution can often be advantageous.

Buying option

Proven import solutions provide a fast integration. While building a custom importer can take weeks to develop, a ready-to-use solution can be integrated in just a few hours.
The monetary investment is just as predictable as the time it will take to integrate the solution. Costs can be calculated better through clear pricing plans and contracts. The prices are lower and can be terminated more flexible than, for example when extra staff is hired to cover the additional workload in the development team that is incurred when developing an in-house import solution. Opportunity costs do not arise. In the scenario of using an external software solution, the core activity of the development team remains completely unaffected, without having to deal with time-consuming concept proposals for solving the import problems.

Last but not least, software providers are very skilled in their field. Thus, import software providers are experts in data importing and have a high degree of expertise from which their customers benefit. If any problems occur, their clients can rely on their vendor's customer support and will always be able to provide their clients with advice and support quickly and efficiently.

The nuvo importer

nuvo realised the importance of a smooth data importing experience and created an AI-supported file importer than can be implemented in any web application with just a few lines of code.

By utilising AI to effortlessly retrieve file data in just the right format, the nuvo solution aims to offer its customer the best possible file import experience.

If you wish to learn more about nuvo visit getnuvo.com or contact us per mail via support@getnuvo.com