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Preppin' Data

A weekly challenge to help you learn to prepare data and use Tableau Prep

2019: Week 5

March 13, 2019

Hands-up all of you who have a system in your organisation that let's your team enter free text answers in to a system? Ok, well that's most of you and I feel for each and every data guru that sits at the end of the database where that information is stored. If you didn't put your hand up, you will have a lot to learn this week!

Notes	
Called about their policy #0301. Wanted to know the balance.	
Called regarding policy #0301. Change of Address requested.	
Enabled about the recommendation scheme. Wants to get the bonus for Customer 23013	
Called complaining. Had to wait on the line and called back multiple times. Phone from his too busy apparently. Give \$40 to shut them up. Added to account #3001	
Email about #0301. Raised a complaint.	
Called about policy #0301. Give the wrong postcode! And?	
Email asking to Change Address. Change made to policy #0301	
Enabled requesting a new savings account. Policy created #0300	

I have often wondered whether I would have a career if it wasn't for projects delivering new operational systems not considering that the 'Junk In' to 'Junk Out' rule is a very pertinent one. Project budget cuts, lack of data awareness and time constraints all lead to a perfect storm of project delivery challenges. One of the side-effects of this is felt as soon as the project releases; how is the new system performing and is it doing what we expected? Welcome to this week's challenge!

The input for this week's data is from a small financial services company's contact centre who have to measure some key statistics like:

- Number of Balances that are being requested
- Number of Statements being asked for
- Number of complaints being raised

Date	Customer ID	Notes
Monday	72017	Enabled. #0301 asking for a statement
Monday	39822	Call came in correcting the incorrect corrected postcode. #0301 updated and I've sent the client a link to an optician
Monday	29439	Called about their policy #0301. Wanted to know the balance.
Tuesday	29439	Called about incorrect balance on policy #0301
Tuesday	12219	Email about #2001. Complaint about complaint note being dealt with fast enough
Wednesday	34030	Email regarding #0301. Statement requested.
Thursday	99999	Call. Wrong number
Thursday	99999	Call. Still the wrong number
Thursday	99999	Email. Asking for the correct number for Pizza Junction
Friday	29439	Email about #0301. Customer thanking me for my awesome work. Apparently I rock!
Friday	72017	Email. Wants to close policy #0301

We need to know those numbers by Policy Number and Customer ID so we can see who is using the call centre to hopefully get them on to our website instead to self-service. When are our busiest days for the contact types above? The data set we are asking you to create will allow you to load that in to Tableau to get those answers - create a viz if you want to!

Requirements:

- Input data set
- Create a date per day
- Determine how the customer contacted the company
- Create a separate column for the Policy Number
- Remove contacts that don't have a Policy Number
- Identify whether the contact was about a balance check, getting a statement or raising a complaint (it's all our boss cares about)
- Get rid of unrequired columns

Statement?	True Date	Balance?	Complaint?	Policy Number	Customer ID
0	18/06/2019	0	1	3001	27316
1	26/06/2019	0	0	4002	34399
0	19/06/2019	0	1	2001	12219
0	21/06/2019	0	0	6090	40201
0	25/06/2019	1	0	4899	29439
0	17/06/2019	1	0	4899	29439
0	24/06/2019	1	0	4899	29439
0	28/06/2019	0	0	4899	29439
0	28/06/2019	0	0	2080	72617
0	20/06/2019	0	0	4030	39822
0	24/06/2019	0	0	4030	39822
0	25/06/2019	0	1	2001	12219
1	24/06/2019	0	0	2080	72617
0	20/06/2019	0	0	9220	49291
0	18/06/2019	0	0	4030	39822

Output:

- 15 Rows (16 including the column)
- 6 Columns
- One row per day, per customer and policy

For comparison, here's [our output file](#). Don't forget to fill in our [participation tracker](#)!

AggregationString CalculationsUnion

Popular posts from this blog

2023: Week 1 The Data Source Bank

January 04, 2023

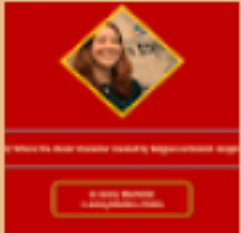
Code	Value	Customer
1-076	1-000	
2-001	2-000	
2-006	2-001	
3-004	3-001	
4-007	4-001	
5-008	5-001	
6-006	6-001	
7-005	7-001	
8-009	8-001	
9-002	9-001	
1-070	1-000	

Created by: Carl Allchin Welcome to a New Year of Preppin' Data. These are weekly exercises to help you learn and develop data preparation skills. We publish the challenges on a Wednesday and share a solution the following Tuesday. You can take the challenges whenever you want and we love to see you...

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2021: Week 22 - Answer Smash

June 02, 2021



Challenge By: Jenny Martin Recently, my family and I have become quite invested in the TV quiz show Richard Osman's House of Games . The final round is always a round called Answer Smash. In this round you have a picture and question and you have to "smash" the name of the picture with the answer...

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How to...Handle Free Text

January 24, 2020

Notes	Value
Called about policy #0301. Wanted to know the balance.	
Called about their policy #0301. Change of Address requested.	
Called complaining. Had to wait on the line and called back multiple times. Phone from his too busy apparently. Give \$40 to shut them up. Added to account #3001	
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Called regarding policy #0301. Change of Address requested.	
Enabled requesting a new savings account. Policy created #0300	

Free isn't always a good thing. In data, Free text is the example to state when proving that statements correct. However, lots of benefit can be gained from understanding data that has been entered in Free Text fields. What do we mean by Free Text? Free Text is the string based data that comes from allow...

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