ON DEMAND AGILITY SOLUTIONS

Case Study

Client Contact
Information Management

To consistently beat the competition, the market leaders utilize systems that integrate all aspects of their client information reporting to deliver insight to decision makers.

This case study presents our experience in providing a solution to one of the world's largest financial services companies by implementing a 'merger and integration' of the Customer Information data that existed in two different contact management systems and supported two different sets of business processes running on client-server technology.

It also highlights how we helped our client save money, increase quality and reduce risk through technology and business process outsourcing.

The Business Environment

In 2003, a leading Fortune 100 Financial Institution - offering a variety of products and services, including life insurance, mutual funds, annuities, pension and retirement related services - acquired a company that propelled the merged entity into the top 10 spot in that market. Post-acquisition, the institution considered various technology integration projects to integrate the operations of the two merged entities.

The client's Requirements

The post-acquisition integration of the two entities necessitated the integration of two different technology platforms including various transactional systems, sales databases, administrative systems, fulfillment systems, sales software etc. There was a need for a single integrated CRM solution for the upper management to make strategic decisions as well as support the Sales Force on day-to-day tasks. This new system, based on E.piphany Sales and Service product, would replace the two existing systems–one in each company that had joined forces.

- E.piphany core product installation with OOB (Out of box) features.
- Integration with the client's Single Sign On (SSO) system, Lotus Notes calendaring system, interfaces with client's own systems and third-party systems like the fulfillment vendor system.
- Customization of the core E.piphany OOB product to support the business processes.
- Merging data from two separate systems including cross-referencing, de-duplication, merging, transformation, and loading clean data to E.piphany's operational database schema.
- Operational Reporting to support day-to-day reporting needs.

The Challenges

The biggest challenge was the merging of Customer Information data existing in separate contact management systems that was supported by two different sets of business processes, running on client-server technology. After a long due-diligence and product comparison process, the institution selected E.piphany Sales and Service product to be the base product on which to build the new system.

The next hurdle posed was the architectural challenge of how to use the configuration of E.piphany to the maximum extent by encapsulating majority of the business requirements. Certain requirements would require customization of E.piphany and would be done where configuration would not do the needful. In a rare scenario where E.piphany interfacing had to be done with an external API not supported inherently by E.piphany, development would be done using Java standards.

It also had to be ensured that ECMS fit within the client's Network Architecture and interfaced with the existing systems. Besides, being fully geared towards the migration of data from the systems that would become obsolete after ECMS became the Contact Management System for the client.

On the technical side, the most demanding test was to work on a New CRM Product and ODA's offshore team was only one of the handful of service providers in this area in India. On the other hand, geographically distributed teams (New York, California, India) needed to work in close coordination along with keeping the cost within budget for such a long duration project.

Last but not the least, end users were to be involved and trained right from the beginning of the project. It was extremely important to gain end user buy-in from the very first stage of the project.

Our Solution

- The reason why we emerged as the winning solution provider were:
- In-depth knowledge of the financial industry.
- Close working relationship with the client on various prior engagements ensured a better understanding of existing systems and business processes by ODA.
- We had just implemented a large data warehouse for this client that was reaping the benefits of a single exhaustive information source to support strategic decision-making.
- Ability to scale software development teams, with a variety of experience and skills sets, across the globe at short notice.
- Matured process framework already demonstrated in prior engagements to predict high-quality, on-time software releases.
- Ability to quote a fixed price for such a large project that too almost at half the cost indicated by our closest competitor.

Composing The Team

A medium-sized team with around 14 members was constituted for development. The Onshore Team comprised of a Partner, Project Manager, one Quality Analyst, one Requirements Analyst and two Developers. The Offshore Team comprised the Project Lead, four Developers, two Oracle Warehouse Builders, two Quality Analysts and two additional resources. The recommended technology platform was J2EE. The development work was scheduled for a span 16 months.

Solution

During the preliminary analysis, it was clear to the Project Management team that several functionalities such as login facility and home page customization would have to be provided. Particular desks within the merged entity would have the same functionality as general users. Details such as Customer Profile, Business Rules, Creating and Modifying Meeting Schedules would have to be built in.

In addition, Territory Queries would have to be handled; Notifications and Customized Reporting Options would have to be provided for the scheduled team and reports. Marketing Events, Marketing Exclusions and Marketing Fulfillment facilities would also have to be added to the system. The system would direct to a vendor the orders for dispatch of product-related literature to different locations. Other related functionalities such as mailing labels generation, email address fields' creation, and lead management would also have to be provided.

The project was kicked off by setting up of a Global Project Office with a clear organization structure that provided clear points of communication and escalation to the client's team and also for teams within ODA geographies. When development commenced, prime focus of the team was on the security feature of the system and authentication and authorization of the users. In this respect, the Webseal configuration was used to achieve Single Sign On (SSO) by implementing the SSL protocol.

Further, a business, scope and feasibility study was conducted during the requirements workshop to finalize the requirements of the system. Functional and technical design specifications were outlined. A detailed use case analysis was conducted to capture all aspects of the system requirements. Demos and presentation to business users were conducted occasionally to keep stakeholders abreast of the development progress.

At this stage, the team provided valuable feedback to E.piphany Inc. regarding certain security and authorization features in their product. If implemented, this feedback would lead to further enhancements in this new product. E.piphany Inc. acknowledged and responded to ODA's communication by releasing a couple of new patches to support industry standard security and authorization platforms.

ODA was already engaged in building a Sales Reporting Data Warehouse Solution for this client, which resulted in an in-depth understanding of the various database schemas, business objects, data-integration issues and business user requirements. This understanding proved helpful for managing the multiple changes while transitioning to E.piphany Sales 6.5 CRM under the present project's scope.

- Two initial demonstrations for the client were highly successful.
- **UI part for UAT**: A month prior to production, all development work on the project went for a UAT at the client site. The UAT was conducted by a highly

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skilled team, which included members from each level of the corporate hierarchy.

- Data Migration was also a part of the UAT. As ECMS replaced the existing legacy systems, the data of the two existing systems was successfully migrated to ECMS.

Besides, learning from ODA's own experience and from that of the industry's published literature, the team had certain core success criteria that had to be implemented from day one. These included:

- Close and continued involvement of stakeholders in the project.
- End-user involvement and training to ensure early buy-in for the solution.
- Data cleansing and presenting clean data in a new system for the best first impression.
- Implementation of lightweight process framework like UniRAD.

Mitigating Risks

The rate of successful CRM implementations in the industry is about 30 percent and the remaining 70 percent makes way for the failure rate. A careful analysis of the key improvement areas, rigorous planning and execution are a must to ensure successful implementation of CRM. In order to mitigate risks, ODA ensured that the stakeholders were always involved in the entire program life cycle. The project team revisited the requirements by conducting requirements workshops when the stakeholders were changed in the middle of the program. Demos were conducted from time to time to maintain the momentum and to facilitate early user adoption. An effective training and deployment plan was created while a phased approach was adopted to maintain scope. The importance of data quality was stressed all through the project lifecycle. This was critical because its quality alone would determine the effectiveness of Sales Data. The UniRAD documentation requirement as integral part of the ODA and the Center of Excellence was never compromised in spite of the challenging and severe deadline demands on the team. The team throughout the project life cycle respected UniRAD Specified Quality Standards.

Conclusion

A positive attitude coupled with the team's constant effort to excel ensured that each delivery fulfilled all specified criteria. The client's encouraging feedback guided the team all through delivery. The client's satisfaction with the team's work manifested in a maintenance project that is to follow.

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About ODA Solutions

On Demand Agility is your unwavering partner in providing Mission Critical IT and Engineering Solutions. We enable businesses to lead market trends with our end-to-end business and technology solutions.

The offered solutions improve process processes and meet industry standards with cutting edge technology.

Partnering with ODA gives our clients access to some of the finest talent in the industry. As a global company with presence in US, Singapore, India and the Philippines, we are equipped to help your business run seamlessly and efficiently.

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