

OpenSpan Extends Siebel for Fortune 50 Sales and Support Center

DRIVES AUTOMATION AND INTEGRATION BETWEEN ORACLE SIEBEL CRM AND OTHER ENTERPRISE APPLICATIONS FOR LARGE PRODUCTIVITY GAINS AND FAST ROI

CLIENT

The client uses a Siebel-based desktop environment and is a leader in technology manufacturing, with over 75,000 employees world-wide, annual revenues in its latest fiscal year of over \$50 billion, and over one billion customer contacts per year.

CLIENT CHALLENGE

The client had made a mix of custom-built and packaged software applications that was perceived as a productivity drain within the sales and support desk environment. Agents were losing time and getting frustrated from excessive manual processes: flipping between active windows, copying and pasting data between multiple fields and forms, with the real possibility of data errors and costly mistakes. Not only was this inefficient, it made training new agents difficult and time-consuming.

The client then made a strategic decision to build a desktop solution for the sales desk based on Siebel CRM. The top priority was making a broad mix of line-of-business and communications applications “talk” with each other, seamlessly, to ensure customer satisfaction and boost up-sell performance.

The diverse integration challenge included:

- ⚡ The application baseline, which was a Siebel mix: version 7.8 and 8.0 (Web) for CRM and ERP
- ⚡ Remedy Service Desk 7.0 (Web) for case management and support
- ⚡ Talisma (Web) for agent/customer chat
- ⚡ Kana for response and other email

Various integration efforts had been tried to different levels of success, using a mix of in-house-built and heavily customized middleware applications.

OPENSAN-ENABLED SOLUTIONS

OpenSpan was ultimately chosen as the key enabling technology to fully mesh Siebel CRM’s functionality with the existing application architecture in the following key areas:

- ⚡ **Integrate multiple legacy applications** including Windows and Web applications, without code modifications. OpenSpan allowed the client’s developers to connect the application mix described in the challenges section of this paper for true unified operations. This was done in a mashup common to all agent desktops for single-touch access to all relevant applications.

- ⚡ **Automate time-consuming manual processes.** OpenSpan was utilized to automate around 70 workflows, replacing many manual processes such as copying-and-pasting between applications.
- ⚡ **Extend SOA to the desktop environment.** OpenSpan enabled the client's development staff to both service-enable workflows that involved legacy applications and consume services within the desktop environment.

KEY VALUES

The client achieved a number of key benefits during the pilot project, which have continued during the extensive deployment roll-out.

- ⚡ **Short implementation cycle.** The initial OpenSpan automations were delivered with only approximately 10 man-weeks of effort.
- ⚡ **Decreased Average Hold Times (AHT).** By automating several time-consuming manual workflows, the client experienced significant initial decreases in AHT for critical support calls. This will result in a significant ROI when rolled out to the full agent desktop environment.
- ⚡ **Improved up-sell and cross-sell performance.** OpenSpan automations provide customer agents with timely, targeted and scripted offers for high-value and other customers, and automated interfaces to record acceptance or rejection. These solutions also assist with follow-up processes for transaction confirmations.
- ⚡ **Simplified and shortened training for new CSRs.** By streamlining a number of critical business processes, OpenSpan has helped the client to significantly reduce the time to train new agents and greatly improve retention for current, experienced employees.
- ⚡ **Compliance assurance.** Automated references, scripts, and note fields which auto-populate with prompts and synchronize customer data across applications reduce data errors to near zero and ensure that regulatory and procedural steps and requirements are followed.

SUMMARY

The client's sales and support center needed a common agent interface centered on Siebel CRM, and had a large investment in disparate, legacy communications and other indispensable desktop tools and applications. As often happens, there were no obvious APIs or other integration points among several key applications, and even back-end attempts by in-house IT specialists didn't achieve the desired level of performance. OpenSpan assisted in critical integration operations, and then went several steps further in automating, service-enabling, and streamlining the agents' workflows. The result was a significant improvement in productivity and call resolution outcomes, and tens of millions of dollars in anticipated savings and new revenue into 2010 and beyond.

GET MORE INFORMATION

OpenSpan initial projects alone can deliver huge productivity improvements and significant cost savings; subsequent projects rapidly pay for themselves. Browse other OpenSpan case studies, white papers and online demonstrations by visiting www.openspan.com.



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