One View of the Customer:
Implementing a CRM Solution
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One View of the Customer: Implementing a CRM Solution

One view of the customer.

It’s a nice idea, and a popular one. After practicing “catch and release” marketing for many years – prospecting for customers, acquiring them, completing the transaction and then, effectively, letting them go – most businesses are only recently embracing an approach that seeks to cultivate long-term relationships: to maximize share over the lifetime of each customer. That’s only possible if the customer feels recognized and appreciated, and his or her business needs are fully served at every step in the relationship. Hence, the need for one view.

There’s an old adage about Cadillac dealers training their salesmen to picture “$400,000” flashing over each prospect’s head as he or she walked into the showroom. Sell a car today and watch the customer drive away, and you’ve probably made a decent profit. Build a relationship with that customer, build loyalty and capture his or her new car business for the next thirty years, plus repairs and referrals, and the potential profit skyrockets.

Those neighborhood car dealers of yesterday could go a long way on philosophy alone. There was but “one view of the customer” – walking through the showroom door – and maybe a second one at the service counter, but that was it. Fulfilling the customer’s expectations and building his or her loyalty didn’t require a complicated technology-based solution – a handshake and good intentions went a long way.

For the modern multinational corporation, however, things aren’t so simple. What does it even mean to maintain “one view of the customer” when:

- The customer lives in any of more than sixteen countries and speaks one of more than half-a-dozen different languages?
- The mobile sales force needs to maintain the integrated view of the customer from one office to another, from one country to another, and in transit?
- The “views” of the customer include sales and customer service, face-to-face as well as telephone and online channels?
- Customer information is housed in multiple databases across thirty-eight client legacy systems?

Suddenly, maintaining an integrated view of the customer becomes impossible without technology. But which technology, and how to effectively implement it over a dynamic and international marketplace – seamlessly, and without excessive interruption to the daily flow of the core business? And, perhaps most crucially, given the number and diversity of anticipated users and the requirements for efficiency and simplicity, how to ensure that the integrated technology solution is itself integrated and the users are trained to true comfort and proficiency? New technology fails as often for integration failures as for implementation failures.

Those were some of the issues facing the client on a recent implementation for IBM Business Consulting Services, the worldwide leader in providing management consulting services. While IBM Business Consulting Services is second-to-none in technical expertise, we do not ever recommend and pursue technology implementations without first helping our clients understand how those recommendations align with their business strategy, goals and objectives.
This area of consultative expertise draws upon the resources of IBM Business Consulting Services, which helps clients maximize their business performance by integrating strategic change, process improvements and technology solutions.

Out of respect for our client's confidentiality, we are referring to them in this whitepaper as SystemTECH. SystemTECH specializes in the production and delivery of high-end computer technology. They have over 4,000 employees worldwide and do in excess of $1-billion annually. SystemTECH's products, in part because they efficiently accommodate the manageability and scalability requirements of growing business infrastructures, have become part of the infrastructural "backbone" of the E-Business sector.

Hampering their further success in a dynamic market has been the inefficiency of their customer management. The lack of CRM (Customer Relationship Management) based tools for the sales force has resulted in a number of significant, detrimental consequences, prominent among them:

- Missed sales opportunities.
- Inaccurate forecasting.
- Customer dissatisfaction with support and upgrades.

To address these shortcomings, SystemTECH and IBM Business Consulting Services selected Siebel's enterprise-class CRM-based applications for the automation project. Siebel's web-based architecture supports the complex needs of global corporations such as SystemTECH. It provides enterprise-wide support for internal sales, marketing and customer service organizations and facilitates real-time integrated interaction among sales, customers and service links across countries and continents.

"One view of the customer" is enabled on a broad scale by seamless rapid data synchronization from the corporate or regional server, to local offices and the mobile sales force. Correctly configured, the Siebel architecture creates a common entry point: one system for input data to be synchronized and updated across multiple sites – and allowing shared viewing among multiple users simultaneously.

That functionality, in a nutshell, is what IBM Business Consulting Services set about to deliver to SystemTECH through its expert Siebel implementation:

A cost-effective enterprise-wide CRM-based solution to automate, streamline and integrate the sales operation, along with customer service and marketing – toward greater productivity, predictability and profitability through the use of a single integrated tool.

On its face this is a project comfortably within the grasp of IBM Business Consulting Services' expertise. And, indeed, the engagement has been completed within the area of Sales Force Automation with excellent results: on-schedule, under-budget, full technical functionality, and with a high degree of client and user satisfaction.
But in getting to that point – and quickly, in only nine months – there were a number of special challenges and unusual components to the project. The international scope, the teamwork arrangement, the pioneering functionalities sought, and IBM Business Consulting Services’ active role in the execution and knowledge transfer – all these factors and others came into play and were efficiently assimilated into the end-game: enabling the sales force to conduct real-time customer management, with an integrated “one view” maintained from home office to client, from country to country, and at every stop along the way.

In this paper we will present a brief project overview: what we did, why and with what result. Then we will briefly examine some of the particular areas where IBM Business Consulting Services’ thought leadership assumed preeminence – meeting challenges associated with (but not limited to) the following areas of consideration:

- A global implementation: 1,000 users in sixteen countries on three continents – all seeking that one view of the customer from their disparate vantage points.
- Team integration: IBM Business Consulting Services leads a seasoned team that includes SystemTECH staff resources and key contributors from Siebel and EDS.
- Replication and data management: enabling shared updates from office to office to mobile user (and back again).
- Knowledge Transfer: ensuring an enduring legacy of users and staff trainers with comfort and thorough core competence.
Project Overview

The implementation of Siebel has provided SystemTECH’s sales force with up-to-date customer and market information, centralized marketing information, improved sales processes, information gathering, internal communication and the provision of marketing information to meet the needs of sales. The program includes the integration of Palm Pilots, Microsoft Outlook, and the rationalization of thirty-eight legacy customer databases.

The Siebel Sales Force Automation project was a global deployment that involved IBM Business Consulting Services’ project management, training, technical, and process consultants from around the world. We utilized our proprietary Structured Management Methodology (SMM) to accomplish the deployment of the Siebel-based solution.

Under this methodology, the project was divided into Analysis, Design, Construction and Implementation stages.

In the Analysis phase we identified the process issues and captured the business and technical requirements and developed a conceptual design of the system. In this phase we identified that SystemTECH had a problematic lack of uniformed processes throughout the company, especially in sales and customer management. They had, for example, spent millions of dollars developing a proprietary selling tool for their sales force – one they were no longer even using. IBM Business Consulting Services’ approach was to design a Siebel-based solution to leverage the practices embedded in their existing sales regimen and to allow Siebel to shape any additional selling processes. Flexibility and the ability to accommodate future requirements – and future growth – was an essential goal of the engagement.

Some of the tasks completed during the Analysis phase included:

- Identifying technical restrictions, standards and capabilities;
- Diagnosing organizational limitations, especially in the context of prior, failed implementations;
- Developing high level technical requirements, and technical interface requirements;
- Defining preliminary data volumes and communications;
- Developing data distribution and synchronization strategy; and,
- Developing a communication plan.

During the Design stage we transferred the target business process design into a working Siebel system. The identification of key data and the definition of the functional architecture of the Siebel system were important elements of the Design process. The Design process also included the following steps and processes:

- Design of the application architecture;
- Coordination of the acquisition of required hardware and software components;
- Establishing the environments for development, training, testing and production;
- Refining and implementing the communications strategy for key stakeholders;
- Developing the iterative prototype;
- Confirming the functional and technical requirements and design solutions;
- Developing security, audit and control procedures; and,
• Consulting with the business process owners at SystemTECH, then leading the design process with their input and active participation.

During the Construction stage we focused on building the CRM solutions that had been designed. Some of the tasks completed during this stage of the project include:

• Configuring, coding and testing all Siebel routines, using customized Siebel applications;
• Developing unit test scripts based on the user scripts developed during prototyping;
• Performing tests that include all variations of the configured Siebel system;
• Coding data interfaces and data conversions;
• Performing system integration testing;
• Taking the Pilot to a small user group to validate and provide feedback;
• Converting legacy reporting systems to new Siebel-based reporting for more streamlined, efficient and user-friendly reports;
• Implementing the architecture;
• Establishing support procedures; and,
• Establishing problem management process and escalation procedures.

In the Implementation stage we ensured the smooth transfer of the CRM solution from a development environment to live production, and brought the first phase of the project to a formal close. Our tasks included:

• Executing data conversion routines;
• Supporting the live system as required;
• Loading and configuring the new software on user machines;
• Conducting end-user training;
• Developing special materials for the training team;
• Establishing continuous improvement programs; and,
• Working with the client to develop strategies for continued operational and/or marketing efficiencies.

Siebel 99 was deployed on a high-end server using NT. IBM Business Consulting Services implemented both connected and remote clients with a combination of Fat and Thin client architecture. The CRM solution is deployed in three servers (US, Europe and Asia) with dedicated lines between each geographic concentration.

These and other technical advancements prove their worth, not in the complexity of their configurations nor the elegance of their code, but in direct benefits to SystemTECH: from integration comes efficiency, from efficiency productivity, and from productivity profitability. All this, and satisfied customers.

What follows is a quick summary of some of the special issues and implications encountered, pertaining particularly to:

• A global implementation
• Team integration
• Replication and data management
• Knowledge transfer
Global Implementation

Siebel was deployed to over 1,000 users in 16 countries across three geographical regions. Users are located in France, Germany, United Kingdom, France, New Zealand, Australia, Japan, Korea, India, Hong Kong, Indonesia, Malaysia, the Philippines, South Africa, Singapore, and the U.S.

The implications of this degree of global coverage are obvious. Thousands of miles, different time zones, different languages (both for users and customers) – all seeking to be united by one integrated system to manage their customer interactions.

For this reason, before the implementation could even get started, steps were taken to ensure buy-in – even enthusiasm – from users in all the regions. Workshops were conducted, and influential champions were cultivated for their ability to sow excitement and participation. A global panel of “super-users” was convened and empowered with extensive hands-on involvement in testing the pilot programs. These and other pilot users were kept informed with regular updates and point releases, demonstrating to them the progress being made in building the tool, and allowing users to pilot the application in a test environment. The team also conducted global road shows and seminars to communicate the project goals and receive feedback on the tool from the various user communities.

Other innovative practices to build acceptance, seek input and ensure a smooth transition to the new integrated tool included:

- International panels convened on Best Practices;
- Regular conference calls and other communications to anchor Best Practices to local points of reference and cultivate advocacy; and,
- Email and telephone hotlines for support, with additional contact channels to consult with a variety of subject matter experts.

In the end, the success of the installation reflected the early commitment to approach the Siebel implementation with a holistic, global view. For the program to work, it would rely not only on the technical feat of building the international infrastructure – no small achievement in itself – but also on the early and committed efforts to hear concerns, investigate issues, cultivate champions and build advocacy.
Team Integration

"Your worlds, our people." Those are words we use at IBM Business Consulting Services to remind us of our commitment on two levels:

- First, that when we go on-site, we enter our clients' worlds. We do this respectfully, and we do so to learn from them – never forgetting that our clients bring key knowledge about their core business and working environment that can only make our work better.

- Second, that our greatest resource is our people. That vast legacy of historical and institutional knowledge and best practices we have at IBM Business Consulting Services would mean little today without the thousands of staff who carry our practice forward and elevate it by their own expertise, thinking and experience.

But leading doesn’t mean going it alone. And on the SystemTECH engagement, we helped build a team of diverse talents, from a larger than usual roster of expert participants.

The SystemTECH team included:

- 6 dedicated consultants, leading and directing, with overall management responsibility for all phases of the project;
- 14 additional IBM Business Consulting Services staff brought in as-needed – as expert resources during one or more phases of the installation;
- 11 SystemTECH staff, providing their in-house and local expertise, as well as insights into their own markets and customers;
- 2 people from Siebel, bringing to the table the greatest technical depth of knowledge as to their own product; and,
- 11 dedicated staff from EDS.

It was the participation and contribution of the EDS resources that made this project most unusual.

We always anticipate bringing expert resources from our client into our project team. In this case, SystemTECH already had EDS staff working in the areas of system and interface configuration as the project began. This situation has the potential benefit of additional expertise being brought to the table, but also the possible hindrance of adding more consultants to the mix – with the potential for conflict, territorialism or worse. IBM Business Consulting Services was proud of, and SystemTECH was delighted with, our ability to bring disparate perspectives together and lead the work harmoniously toward a common goal.
Replication and Data Management

The distribution of users required a central server for each of the regions: the Americas, Asia and Europe. To share the information across the regions, IBM Business Consulting Services implemented the Siebel replication manager to consistently synchronize the records across the three regional servers.

This technology was new, and had never before been used on a project of this scale. But the commitment was made that the success of the program depended on regular and reliable replication among users and across databases. The successful implementation of the replication manager solution has ensured the servers stay synchronized at all times – providing the technical means to provide that “one view” of the customer.

At the outset, SystemTECH had 38 legacy systems utilizing 38 different customer databases. The scattered views of a customer made it impossible for the company to get an accurate view of their relationship with the customer and manage the relationship efficiently. This fragmented view also hampered the client’s ability to forecast, market, and sell to the customer.

The IBM Business Consulting Services implementation team worked with SystemTECH to combine and clean the 38 databases into a single customer database that could be accessed through Siebel. This produced a consolidated perspective of the customer for finance, sales, and marketing purposes.

But customer interaction doesn’t occur at a single point of entry or central database; at SystemTECH, the Sales Force was using a variety of contact and communications media and full integration required those channels be linked and synchronized. The IBM Business Consulting Services team implemented a cutting-edge solution: the integration of data among Siebel, Microsoft Outlook, and the sales force’s individual PDAs.

However, not all data in a personal database are necessarily appropriate or useful in a shared view environment – each sales executive had individual contact and activity information for his or her own clients in Outlook or on a PDA. So the configuration team implemented a solution to allow the data to be passed from PDA to Outlook to Siebel and marked as “personal contact information” – that way, only that user could then see the information.

Once comfort level was achieved, it would be possible to implement a validated contact system under which personal information could be seen by all users with the correct access.

This facilitated productivity in a customer-centric “team-selling” environment, in which managers, sales reps and service people were able to unite around a customer base – and bring in additional resources as-needed – to gain insight, intimacy and customer confidence.

The integration was also important from a data perspective, as it reinforced the premise that all customer data would be contained in Siebel – assuring that the picture of the client would be kept as complete and accurate as possible. A half-dozen separate tools were consolidated into one, and over thirty separate functions which had been conducted manually were automated. So the ancillary benefit of attaining better customer management was that higher productivity rates for sales and service could also be achieved.
Knowledge Transfer

As mentioned earlier, this was not SystemTECH's first foray into sales force automation: they had previously spent millions of dollars on a white elephant proprietary selling process which had largely gone by the wayside. That system had failed for its technical limitations – but also for the incompleteness of its implementation and the inadequate training which had been conducted.

That danger was presented again, when SystemTECH's own resources were self-assessed as not being up to the task of ensuring successful integration and training. Considering the internal history of implementation breakdowns, the circumstances seemed ripe for skepticism and even cynicism on the part of the SystemTECH's staff, particularly the prospective users.

To ameliorate this concern and to facilitate as smooth a transition as possible, IBM Business Consulting Services stepped in and largely took over the training responsibilities. Demonstrating resourcefulness and flexibility, we instituted a variety of training tools and practices, including:

- Developing training materials to specifically match the customized Siebel application.
- "Training the trainers" to ease the transfer.
- Executing a variety of change integration strategies to build internal confidence and advocacy.
- Delivering a training "road show," conducted on a global basis and in multiple languages.
- Communicating the navigation and software utilization training for Siebel, while also conveying the business process for Siebel within SystemTECH.
- Preparing a IBM Business Consulting Services Toolkit of training materials to ensure portability and legacy transfer.
Conclusions

The successful deployment of Siebel under the unusual and challenging circumstances at SystemTECH, and the results as measured in preliminary surveys of productivity and customer satisfaction, are testament to the value of CRM strategies for sales force automation, the integrity of the Siebel systems implemented, and the ability of IBM Business Consulting Services consultants to deliver.

Under relatively "normal" circumstances, an engagement that required the integration of 38 legacy data systems, training and executing in multiple languages on three continents, Siebel expertise, strategic consulting and the ability to unite technology to the client's broad communications plan, would require extraordinary thought leadership and technical expertise.

But complicating matters further was the mid-project acquisition of SystemTECH by its new parent company. During several months at the crest of the implementation, uncertainty was prevalent and the special technical implications of the acquisition – the requirements of integrating certain data flows to the systems of the new parent company – were coupled with the circumstances of job insecurity among several key players.

But those are the worlds in which IBM Business Consulting Services consultants find themselves every day. Maintaining one view of the customer, for maximum productivity and profitability of the customer relationship, requires more than strategic thinking and technical expertise. In today's business environment, it requires flexibility, creativity and innovation. In selecting IBM Business Consulting Services as their implementation partner to deliver a Siebel-based CRM solution that works, SystemTECH got all three.
About the Author

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Alex Kramer is a consultant with IBM Business Consulting Services and has over 20 years experience in Customer Relationship Management applications — both in systems development and global implementations. Mr. Kramer has managed implementations of worldwide Sales Force Automation applications, global multichannel customer contact/call centers and distributed marketing systems. He has worked extensively with customer relationship marketing systems and large-scale database targeting and segmentations systems.
To learn more about our global Electronics Practice, please visit www.ibm.com/services/strategy/industries/electronics.html or contact an IBM Business Consulting Services representative.