

Siebel CRM for Financial Giant

workMETHODS
FASTER, BETTER, SMARTER BUSINESS PERFORMANCE

Challenge

Our client is a large government sponsored enterprise chartered by the US Congress with a mission to provide liquidity and stability into the housing and mortgage markets.

The client had already purchased Siebel CRM. They were looking for a team who could install, customize and integrate Siebel CRM. Moreover, the client desired to replace few divisional-level campaign management applications with single centralized Siebel CRM.

Our Solution

Our professionals worked with the client and charted a two-year plan to install, customize and integrate Siebel CRM. The plan included roll out schedule for different divisions. Additionally, the plan included schedule for migrating existing data from divisional-level campaign management systems into Siebel CRM.

workMETHODS successfully installed Siebel CRM. According to requirements from few key departments, workMETHODS customized the campaign management, sales force automation and customer support modules. Workflows were customized to automate individual division's business processes. Custom reports and views were customized to meet the needs of different user groups.

This Siebel CRM was integrated into upstream and downstream IT systems to exchange information. As the Siebel CRM was chosen as master of customer information, web services were built. For data exchange, we leveraged existing Informatica Powercenter to perform ETL functions.

Replacing marketing campaign management applications with Siebel CRM was complex effort than previously perceived. workMETHODS successfully addressed client's organizational issues as well as technical challenges while combining the data onto one platform. Transition for few users from email based campaigns to an enterprise grade application was a steep learning curve. Centralizing leads and customers data, particularly the email preferences, were challenging due to the data quality.

The client IT was heavily regulated. workMETHODS had to follow customer's custom methodology for project management. Our Project Managers prepared documentation mandated by the methodology as well as rigorous process for migrating changes to Siebel CRM. Project Managers worked with the project audit department to ensure compliance. workMETHODS had to build development, test, user acceptance and production environments for Siebel CRM along with all customization and relevant data. At the end of the project, workMETHODS handed over Siebel CRM implementation to the client's IT department.

During this multi-year deployment plan was being executed, workMETHODS had to keep up with other IT initiatives/projects and ensure that Siebel CRM is in line with the overall IT strategy. During the bake-period, workMETHODS worked with several divisions and supported the application to ensure successful deployment and improved adoption.

Key Benefits

Improved Productivity

The solution provided a single integrated application for handling all business right from campaign management to customer support. Moreover, the solution centralized customer data, sales data and marketing campaign data. This presented opportunities for management to build meaningful inter-divisional reports. Uniform application behavior reduced training costs.

Moreover, automated integration ensured faster data flow between peripheral systems.

Employees could access this CRM from anywhere over secured connection.

The solution improved overall productivity.

Regulation Compliance

The solution ensures that no emails are sent to email addresses that have opted out from receiving emails for the client.

Reduced Marketing Costs

This enterprise grade application replaced few email vendors and software that departments used for sending emails.

Key Technologies

Siebel CRM
Informatica Powercenter
Web Services for integration
Crystal Reports

Why workMETHODS

We cut your project costs by 40%!

workMETHODS is a global software and consulting services company. With right blend of people, processes and products, we have delivered results to several Fortune 500 as well as start-ups.

Our client relationships are driven by shared values and goals and not by rigid, locked-in contracts that limit your flexibility. We act as your partner and recommend the best solution for you.

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