TCS CRM Experience and Capabilities In Custom CRM

Ver 1.0

TATA CONSULTANCY SERVICES

August 2006

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Table of Contents

1 Introduction

Customer Relationship Management (CRM) has become a dominant influence in the way companies operate in this era of increasingly open economies and converging technologies.

In today's dynamic world, businesses are getting more inclined to getting a solution tailor made for their needs. A solution that does not cost them a zillion and at the same time fulfill their business objectives. They prefer a solution devoid of IT complexities, easy to embrace and manage.

Maintaining and growing existing business applications have been an increasing part of the budget for businesses world wide. As technology evolves parts are getting simplified, while new opportunities and new complexities needs to be addressed.

Today organizations face the following three key challenges in their journey to automate the business processes with the help of IT.

- Customization
- Integration
- Security

Custom CRM scores in all the above three areas – Providing a custoimized product to organization by looking at their needs, Tightly integrated with all the legacy applications and highly secure.

Companies that have already embarked or thinking of venturing on the CRM journey need to take advantage of this paradigm shift and adopt the custom driven CRM solutions synched with fast evolving technologies. TCS is well equipped to implementation and support the custom CRM solutions offering high value to the clients

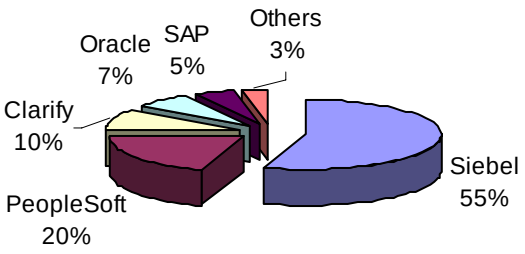
2 CRM Practice

TCS is a global leader in providing high value CRM solutions. A part of the TCS eBusiness Service Practice, the CRM practice has grown since 1998 to span multiple technologies, functional areas and industry verticals. The practice has executed over 400 projects for more than 140 clients, some of the key clients being GE, Target Corp, Bank of America, ING and Verizon.

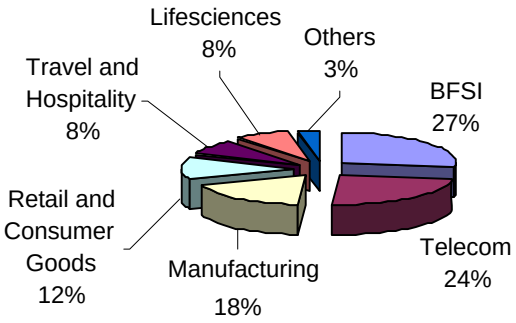
The practice has built knowledge assets, alliances and resources and is structured as consisting of Centers of Excellence (CoE) - communities of experts developing and disseminating knowledge and skills.

The practice has a total strength of over 1700+ consultants who have accumulated over 4000 person years of experience. The experience split, product wise and vertical wise, is shown in the figures below.

Product Expertise (By Revenue)



Industry Expertise (By Revenue)

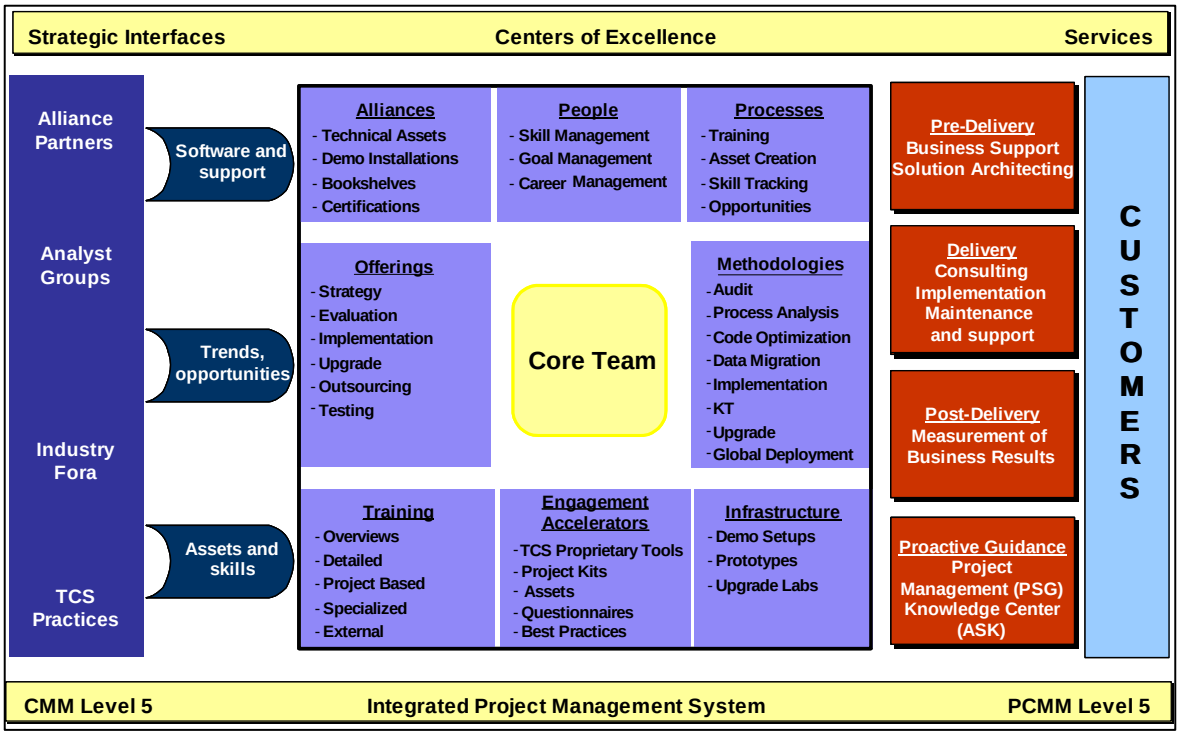


The salient features of the practice are as follows: -

Core Team
Staffed by senior consultants - Center of Excellence leads, business analysts and technology experts - the team is responsible for the successful execution of all the activities of the practice.

Strategic Interfaces
The practice continually renews its assets, skills, infrastructure, knowledge base and go-to-market models with inputs from interactions with strategic external entities such as partners, analyst reports, industry fora and TCS industry practices and service practices.

Centers of Excellence
In order to consolidate and improve skills in specific technology areas, TCS CRM Practice is organized as CoEs, which follow the TCS proprietary eStream™ Model. The practice CoEs works within a well-defined framework explained below.



CRM Practice Structure and Activities

Alliances: The CoEs create, nurture and grow the relationships. TCS has alliances with all leading CRM product vendors as mentioned in the table below.

Product Vendor	Type of Alliance
Amdocs Clarify	Consulting Partner
Oracle	Oracle Certified Advantage Partner (OCAP)
PeopleSoft	Consulting Partner
SalesLogix	Implementation, Reselling Partner
SAP	Systems Integration Partner
Siebel	Consulting Partner

People: The CoEs develop and track resources to be able to deliver projects in time with complete client satisfaction. The focus is to build skills in the whole breadth of applications and industry verticals. The CoE rates the consultants on various parameters. This helps in identifying the suitable consultant for clients.

Processes: The CoEs develop and manage processes for recruitment, induction, allocation, training, skills tracking, creating assets, offerings, methodologies, opportunity management and proposal generation.

Methodologies: The CoEs create and refine standard methodologies for service offerings such as process analysis, code optimization, data migration, implementation, upgrade, AMO, audit, and knowledge transfer.

Infrastructure: The CoEs ensure that adequate and dedicated infrastructure is readily available for demos, prototypes, training and labs.

Engagement Accelerators:

Proprietary Tools: The CoEs develop several in-house proprietary tools that are of immense assistance to the project teams. These tools perform a range of tasks spanning repository analysis, upgrade impact analysis, customization assessment and server tasks monitoring.

Project Kits: These are comprehensive frameworks for the execution of implementation, upgrade or maintenance projects. They consist of standard templates of project deliverables; sample documents, guidelines, checklists and tools, which empower the project teams to successfully execute projects.

Assets: The CoEs create and consolidate intellectual property assets like best practices, frameworks, methodologies, questionnaires, training material, technical white papers, etc.

Training: The CoEs organize training on essentials, overviews, project-specific requirements, knowledge sharing sessions and also conduct external training. They also review these sessions and incorporate feedback.

Offerings: The CoEs develop and mature offerings in the Think, Build and Operate areas, such as strategy, evaluation, implementation, upgrade, outsourcing, testing etc.

Services

The practice raison d'etre is the satisfaction of our customers. To ensure this, the practice is engaged throughout the lifecycle of a customer project: -

Pre-Delivery: The CRM practice supports the client facing teams in architecting optimal solutions for prospective customers. The practice also provides business support in the form of assessment tools and questionnaires for client discussions.

Delivery: The practice develops markets and ensures successful delivery of the offerings through the dissemination of assets, reviews and regular interactions with project teams.

Post-Delivery: The practice monitors the success of the projects through client satisfaction surveys, measurement of business metrics etc. and incorporates lessons learnt and feedback.

Proactive Guidance: The CRM Practice supports the smooth execution of CRM projects by proactively delivering project management and knowledge sharing services throughout the project lifecycle.

Project Steering Group (PSG): The CRM practice has a Project Steering Group to "Discipline and Structure CRM Project Management process through Metrics and affect timely and effective improvements in project functioning".

CRM Assets & Support Knowledge-center (CRM-ASK): The CRM practice supports the CRM projects for technical or functional issues by leveraging the knowledge base being maintained at CRM-ASK, which also coordinates with knowledgeable TCS individuals/relevant projects/other groups spread across different geographic locations.

3 CRM – Build v/s Buy

There has been lots of debate among top executives of the organization whether to build a CRM solution based on their particular needs or buy a packaged solution. Both have its pros and cons and companies can examine the trade-offs of buy vs. build in their own environment.

Parameters	Build	Buy
Cost	• Lower implementation costs • Cost effective as more modules are introduced	• Higher Implementation costs • Need high initial investments covering functionalities which may or may not be used by the organization.
Benefits	• Greater benefits as it is based on individual needs, resulting in exact fit • The higher the potential strategic value, the greater the value of custom-built (or more customizable) solutions. For example, financial trading systems or specialized decision engines (or even specialized customer analysis systems) are often custom built or highly customized to maximize competitive differentiation.	• Many benefits leading to loss in focus in eagerness to realize all the benefits.
Time	• Shorter implementation times	• Greater implementation times
Flexibility	• Simple to manage and control. Does not require too much specialization and workforce • Scalable as per the future needs.	• Complex to manage requiring specialists and more manpower for maintenance. • Scalable as per future needs but requires more integration and complex code changes.
Risk	• Reduced risk as business owners take step by step covering the present functionalities / requirements and expanding into future needs slowly as and when required.	• Significantly high risk as the canvas of change is much more large.

Users	• More acceptable as solution caters to exact need of the users without letting them change or adapt to the new solution.	Need extensive training and users need to adapt to the new solution which could be challenging and face resistance.

Build - Advantage

CRM applications are failing because low end user adoption. End user don't want to change the way they have been working for years. Custom CRM Applications can be built keeping in mind the existing GUI interface of the existing applications and other features like hot keys, shortcuts and tab positions.

Every department has a different need for CRM systems. Call center applications prefer short keys for cursor movement as they want to finish the call in shortest possible time. Similarly sales people have some other need that should be embedded in the application.

Example:

Users	Interface
Sales	Intuitive and Productive with simple navigation and quick views to important information. The application should also be able to integrate with email applications and should support disconnected access.
Marketing	Interface should be able to provide information to the users with the aid of graphics and process flows.
Call center agents	The interface should be able to provide fast transaction process with the help of hot keys, write-ahead, fast paths and consistent placement of customer data. The interface should be able to enhance the productivity of the agent.
External Users/ Partners	The interface should provide information in customizable interface as this user groups needs information spanning multiple enterprise applications.

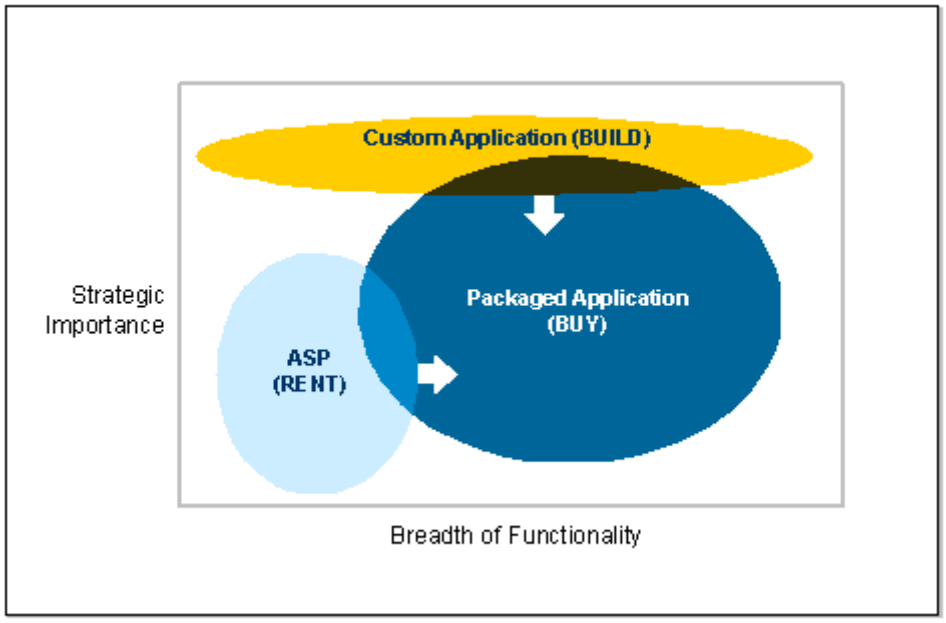
Custom CRM stack well against specialized industry-specific requirements for several good reasons, few of them being:

1. Custom CRM solutions are easier to implement – since they embody more of the organizations business requirements than generic applications, they implement wit less customization effort.
2. Custom CRM solution addresses specific needs of their users by incorporating industry expertise as best practices which often require extensions to their underlying databases.
3. The workflows match to a far greater degree to the business needs of the oragnisation

Thus the role of "Build" methodology is gaining significant strides in many organizations. Custom Application is gaining high on both Strategic importance and Functionality Breadth.

High Strategic importance as organization aspires to take small but sure steps based on their well articulated needs and wants to build on top of this approach.
The functionality breadth extends as the solution is evolved over the period of time with increase in confidence and users of the Build application

Role of Buy vs. Build vs. Rent



Source: Giga Information Group

Build as well as Buy - Combination

The cost of packaged applications can be minimized by picking an application with the best fit (rather than the most functionality), and selecting an application with a complementary architecture (supports company database, application server and user interface standards) to minimize set-up, management and maintenance costs. The emergence of Web Services and more sophisticated configuration utilities, and the use of standard application platforms (such as J2EE or .NET) will allow companies to blur the distinction between categories, lowering customization and integration costs and making it easier to add custom capabilities when needed.

4 Custom CRM

In today's fast paced world the companies are more inclined to build their own CRM based on their niche needs rather than going for buying a packaged software application and then tailoring it for their needs. The mix and match of the component based development such as J2EE and .Net can enable companies to create highly flexible modules for sales, service, logistics, and back-office interface, while internal or commissioned experts integrate and shuffle with pieces in a manner that best suits the company structure.

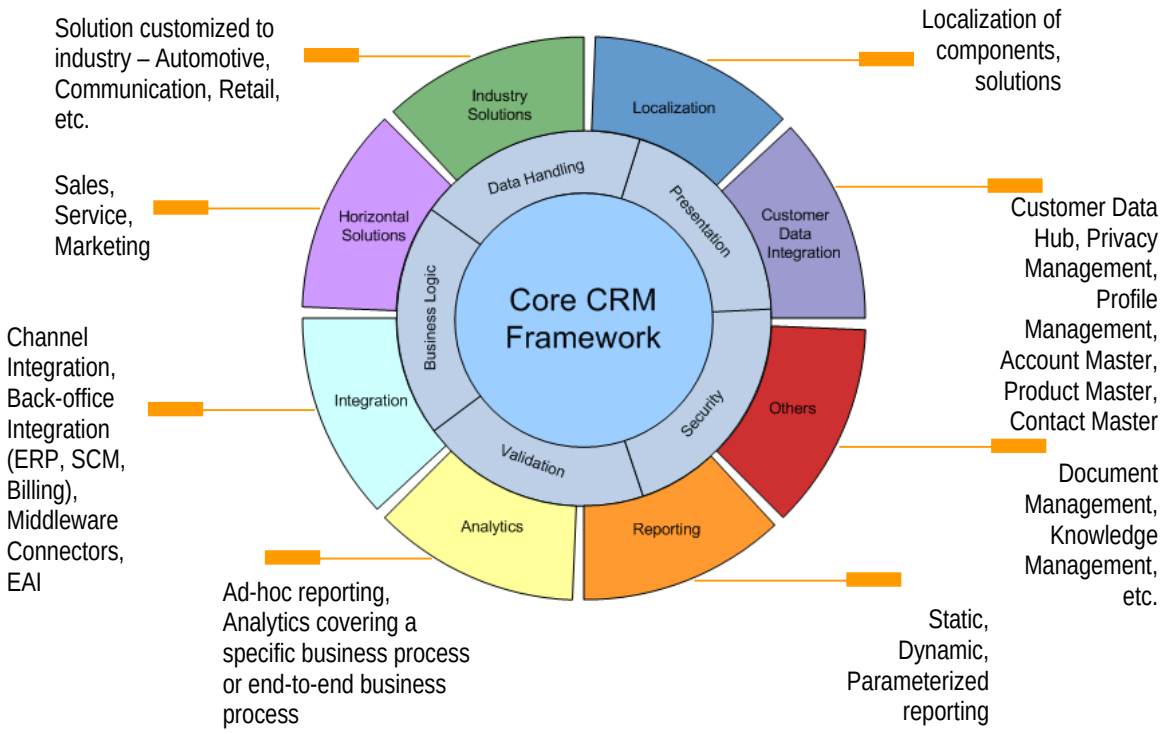
4.1 Macro Trends

- Gartner estimates that the market for custom CRM application platforms is more than $24 billion
- According to AMR Research, more than 80 percent of the CRM market is represented by companies that want to build their own applications or add customized functionality to existing applications using native development tools that run on application servers within a SOA
- Heavy investments in monolithic application packages has led to dissatisfied customers
- Organizations are embracing custom CRM because of low entry costs for implementation, support and maintenance.
- Organizations with industry-specific requirements are opting to build their own CRM applications
- Increase in the purchasing of rule engines and BPM applications
- Advances in integration tools (Web services) and expansion of open-source platforms creates an inviting atmosphere for organizations to deploy a service-oriented architecture
- Component-based design can be implemented as building blocks, and deploy functionality incrementally rather than as one large, risky project.

4.2 Custom CRM Best Practices

- Ensure involvement of end users up-front during solution conceptualization. So there is more acceptability of Custom CRM solution.
- Pre-defined and best of breed business processes, workflows, data model and report sets
- Inclusion / Reference to Industry specific Best Practices spanning business and technology

4.3 Custom CRM Framework



CRM Framework

4.4 Solution Components

The following are the key components on the Solution :

1. Functional Components
- Functional requirements
- Workflows
- Reporting – Batch, User-defined and Parameterized Reports.

2. Technical Components
- Server / Standalone Edition
- System Requirements
- Security
- Audit
- Performance
- Workload Specifications
- Business Continuity and Disaster Recovery
- Reliability

- Integration aspects

4.5 Technology

Custom CRM system is built on internet system and complies with the technology and security standards of the company. It is a multi-tier application with core business logic/services hosted on the application server. The client access tier runs on a browser.

There are two editions for the system, namely the Server Edition and the Standalone Edition.

The Standalone Edition, which contains a subset of functionalities of the Server Edition, shall have no web server or commercial database installed due to the following reasons:

1. Ease of operations and maintenance – since there will be no application server and DB, the installation, upgrade and on-going support can be much simplified.

2. Minimum effort duplication– Although the technology used for the Standalone and Server Edition will likely be different, there will be fewer and simple functions for Standalone Edition compared with the Server Edition. Hence, the duplication effort is insignificant.

The Server Edition version is based on J2EE architecture, in which the users can access the system through intranet or internet.

1. Standalone Edition

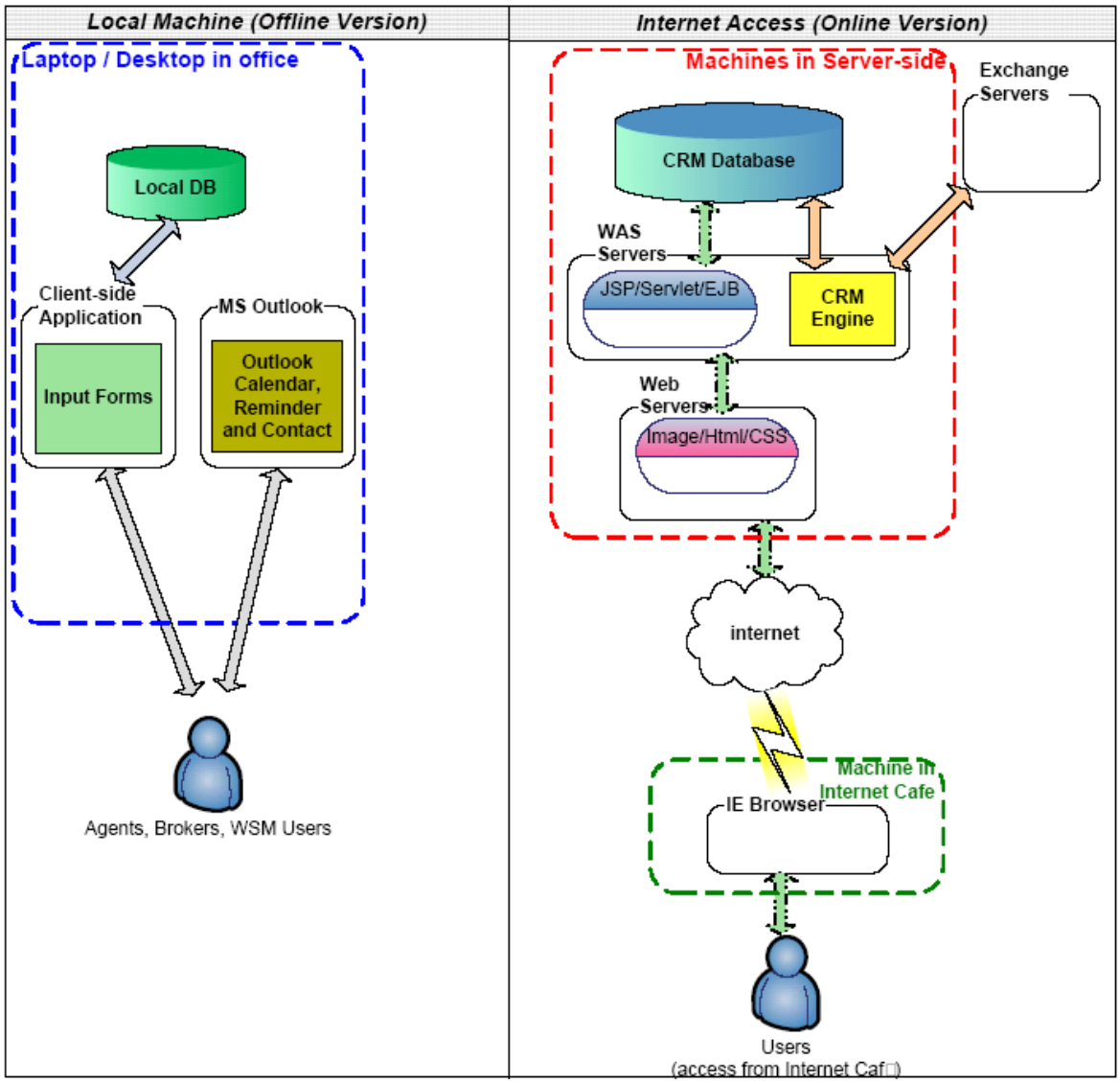
It includes the software components to allow the application to be executed on a single machine configuration (typically a notebook) without any network connectivity dependency. The Standalone Edition provides only a subset of functionalities of the Server Edition to support the required functionality without connecting to the company network. To ensure effective usage of the system, the Standalone Edition has the identical look-and-feel with the Server Edition. The data input is encrypted and stored locally on the machine. Upon connecting to the company network (either through Internet or Intranet), synchronization functionality is built to allow the data to be exchanged between the centralized database and the local machine (Standalone Edition). The users can login in order to access to the Standalone Edition. The whole Standalone Edition is packaged in one single installer for easy deployment. Normally there is no commercial web server and database server is required in the standalone version thus leading to simplified operations.

- **Disconnected Mode**

The system is in disconnected mode when the user uses the standalone edition without connecting to the network. The following are the typical operations performed by the users in this mode:

- In the disconnected mode, users will input forms to enter corporate and client information. The captured data is stored in a local database in file format.

-Users should are able to create a new record, view and modify their input before data synchronization.



Disconnected Mode

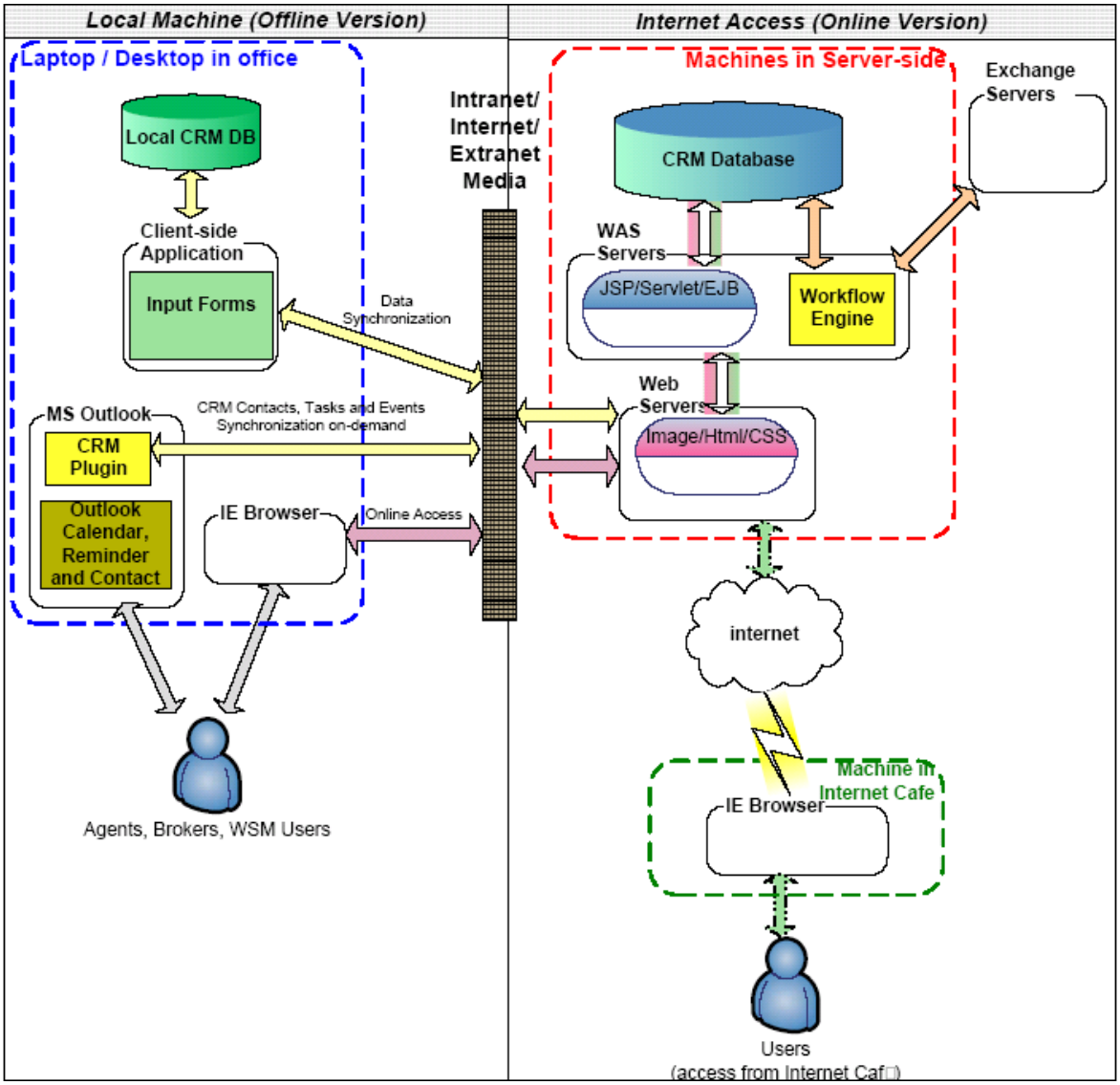
- **Connected Mode**

The system is in connected mode when the user uses the standalone edition while connecting to the network. The following are the typical operations performed by the users in this mode:
- Users use Server Edition to access system functions with IE browser.

- If users' desktop and laptop have been installed with Outlook client, they can install an Outlook client plug-in, which allows user to select contacts, events (calendar) or activities (tasks) in Outlook and synchronize the selected items to the system. Then users can manage the synchronized items through the Server Edition. And at the same

time, contacts, events (calendar) and activities (tasks) for the users in the system are synchronized to their Outlook client. Besides, if there is any conflict between Outlook and the system, alert for conflict resolution will be prompted to user.

- Users can synchronize corporate information stored in the database of Standalone Edition to the Server Edition. Users will manually trigger the synchronization process by using the data synchronization function in Standalone Edition. During the synchronization process, the server will validate the input, check and report for any conflict to users. Users can select the failed records, modify input form, correct the data and synchronize those records again.



Connected Mode

2. Server Edition

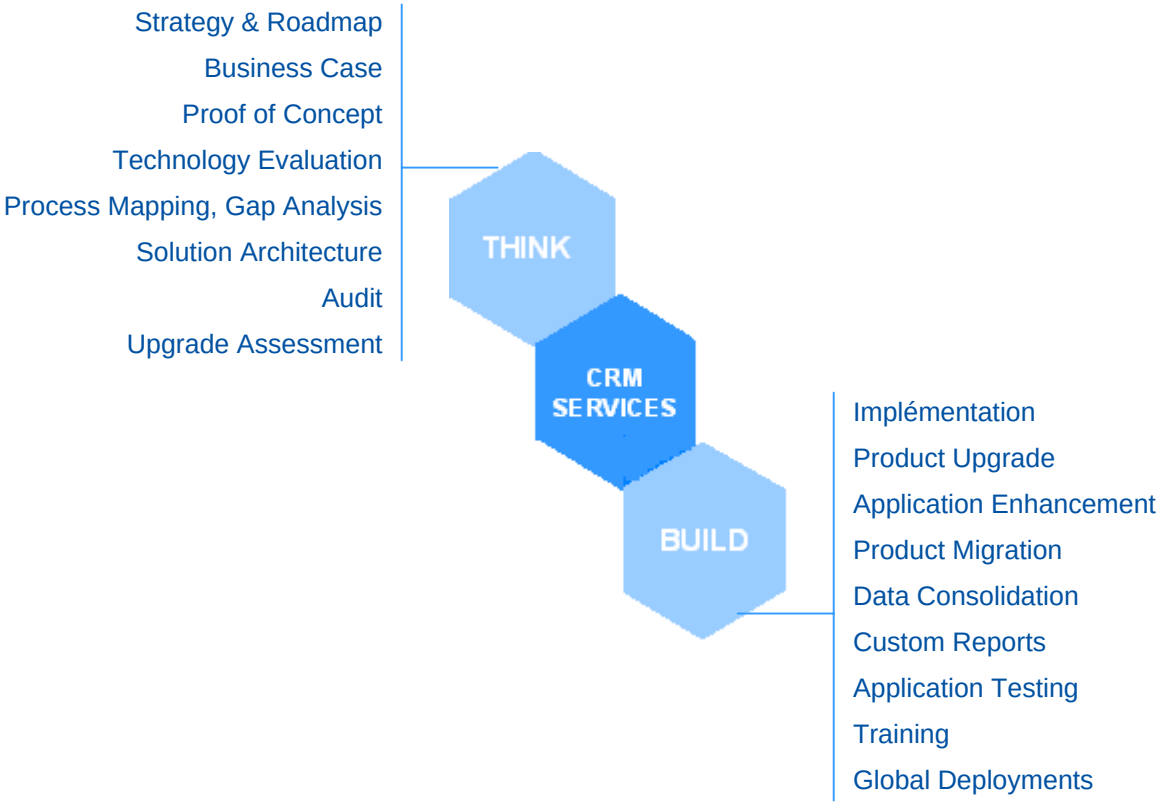
It is installed and hosted on company's production servers so that the users can access the Server Edition in their offices through the company network or the internet. The Server Edition contains the full functionalities of the application and users can login through a secure channelThe application data is stored in the company's centralized database.

- **Online Mode**

The system is in online mode when the user accesses the Server Edition through intranet and internet. The following are the typical operations performed by the users in this mode:
- Users with Internet access can use IE browser to logon to the Server Edition.
- No extra software is required for accessing the Server Edition

5 CRM Offerings and Solutions for Custom CRM

The CRM Practice at TCS offers its customers end-to-end CRM consulting services, from strategy formulation, to development and deployment of the chosen product, to application management outsourcing. We categorize our range of offerings under “Think”, “Build” and “Operate” as depicted in the figure below. The practice has well-developed and mature methodologies for each of these offerings.



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6 TCS CRM Offerings

6.1 Think Offerings

Our Think offerings are designed to help customers formulate their CRM vision and strategy, develop a business case, identify the optimal technology solution and prepare a phased implementation road map which incorporates the specific organizational context and change environment.

Our Think offerings are:-

Strategy and Road Map: This involves understanding the business vision, strategy and goals, studying the current business processes and systems, capturing high-level CRM requirements, and suggesting a CRM implementation road map.

Business Case: This involves understanding the business processes and the business benefits derived thereof, and conducting a cost-benefit analysis of the CRM program. This exercise is designed to help our customers validate and justify their CRM investment.

Proof of Concept: This involves building and demonstrating a CRM prototype to establish that the product or custom solution satisfies the business requirements.

Technology Evaluation: This involves carrying out detailed evaluation and recommending a solution based on various criteria like cost, vendor support, functionality fit, ease of customization, deployment time, industry vertical product offering and ease of integration.

Business Process Mapping and Gap Analysis: This involves mapping the customer's business processes to those of the selected CRM product. Functionality gaps in the product i.e. the desired functionality not met by the CRM product is identified and customizations or alternatives suggested.

Solution Architecture: This involves architecting the various components of a CRM solution and the required interfaces of the CRM product with the back end/legacy systems.

Audit: This involves conducting an audit of the existing CRM solution and suggesting corrective steps in terms of improvements, modifications, or upgrades.

Upgrade Assessment: This involves high-level understanding of current customization and future requirements, analysis and impact assessment with respect to the target version. The high level upgrade project plan and commercial implications determined enable the customer to decide whether to upgrade, re-implement a solution or maintain status quo.

6.2 Build Offerings

Our Build offerings are structured to design, develop and deploy the CRM solution for customers.

Our Build offerings are:-

Implementation: This involves the deployment of the CRM solution and includes activities such as requirement analysis, designing, configuring, testing, and user training and deployment rollout.

Product Upgradation: This involves upgrading from the existing version to the newer version of the CRM solution e.g. Siebel 2000 to Siebel 7.

Application Enhancement: This involves addition of new modules apart from those that are already deployed or enhancing the existing functionality of a CRM solution.

Application Integration: This involves designing and building real time or batch interfaces between the CRM solution and legacy or ERP systems. This could involve initial data load, periodic data migration or real time integration.

Product Migration: This involves migrating the CRM functionality from an existing CRM solution or a legacy system, to the new chosen CRM solution.

Customer Data Consolidation: This involves designing, building and deploying a consolidated customer data model, data cleansing, de-duplication and data validation rules.

Application Testing: This consists of carrying out testing of the CRM solution using real or simulated business data to ensure performance as per required standards. The testing process consists of unit, system and integration testing, and is automated using the appropriate testing tools.

User Training: This involves providing training to the users or super-users from the customer's organization, on the CRM solution's functionality, features, navigation, usage, as well as system administration.

Global Deployment: This caters to the extension of the configured solution to multiple geographies, while at the same time catering to the language, cultural and process preferences of the respective location. This is a critical requirement of companies with operations across the globe and wanting to provide the same experience in all interactions with all their customers.

6.3 Umbrella Offerings

This range of Think, Build and Operate offerings is supported by the following "Umbrella" offerings:-

CRM Program Management

TCS offers to undertake CRM projects on a turnkey basis. Complete, end-to-end Program Management is provided, encompassing the entire gamut of the Think, Build, Operate offerings mentioned above. TCS can also undertake the responsibility of negotiating and

procuring software licenses, hardware, networking and other infrastructure requirements for the program.

Center of Excellence (CoE)

For large organizations typically implementing, enhancing or maintaining multiple CRM applications, TCS offers to build and operate a Center of Excellence. The CoE provides a co-ordinated approach for CRM implementations across projects.

The CoE provides the following benefits to the customer:-

- Uniformity and standardization of tools, methodologies and processes
- Optimal utilization of resources
- Knowledge management, tracking of industry trends and product releases
- Systematic sharing of best practices and project experiences
- Effective co-ordination between projects
- Reduced cost and time to implement

6.4 Benefits

TCS Solution will bring some of the following key benefits:

Business:

- Lower Cost with greater flexibility.
- Leverage existing customer, partner, and other data in new ways
- Reduction in Total Cost of ownership
- Reduced time to market the new services / offers

Customers:

- Increase in customer Loyalty leading to increase in revenue.
- Low cost to serve by streamlining the process adapting to the focused needs of the customers and reducing time to serve the customer.

Technology:

- Increasingly aware of new service alternatives, businesses and consumers demand convenience and superior network availability at competitive prices
- Insist for timely service activation and trouble resolution
- Development Component around J2EE
- Oracle Fusion technology stack can be explored for extensions
- TCS Tool
- Scalable, flexible and SOA standards based solution to meet future IT strategy needs

6.5 Representative Custom CRM Experiences

Client	Details
American Honda	Chosen a J2EE solution against Clarify
Sanlam	Chosen to do a J2EE based contact center against Siebel
EHSN	J2EE Call Center
Amex SDP	Asp/.net based service delivery platform
Tata TeleServices	Custom Prepaid Contact Center Oracle based
BBUL	Custom Oracle D2K solution

7 Value Proposition

TCS believes that the following are key differentiators in its favor with respect to CRM assignments: -

Experience: TCS has successfully executed a large number of CRM projects across the globe and across diverse industries.

Alliances: TCS has alliances with leading CRM Vendors such as Siebel, Oracle, Amdocs Clarify, PeopleSoft, SalesLogix and SAP, which provides access to the latest software, manuals, updates, events and training.

Skills and Resources: TCS has a large pool of experienced senior CRM consultants, banking domain experts, business analysts and vendor certified consultants.

Dedicated CRM Practice: TCS has a dedicated CRM practice with in-depth knowledge of CRM and best practices. It uses Technology Maturity Model to measure and improve practice maturity.

Analyst Recognized: TCS' CRM practice and its projects have been rated highly by industry-recognized analysts.

Assets: TCS' CRM Practice has a comprehensive set of methodologies, guidelines and best practices created and refined over the years, based on its CRM project experiences. These ensure successful project implementations.

Engagement Accelerators: TCS' CRM practice develops project kits, proprietary tools and several assets which empower the project teams to drive the speed and quality of the CRM projects.

Proactive Guidance: TCS' CRM Practice supports the smooth execution of CRM projects by proactively delivering project management (PSG) and knowledge sharing services (CRM-ASK) throughout the project lifecycle.

Methodologies: TCS' CRM Practice has well-developed and mature methodologies integrated with its quality processes and procedures, with well defined entry criteria, tasks, validation and exit criteria for each of the steps/phases.

Onsite-Offshore Engagement Model: TCS has a proven Onsite-Offshore engagement model of executing CRM projects. This ensures cost effectiveness and rapid implementation.

One-stop Solution Provider: TCS' CRM Practice provides complete CRM consulting services covering the entire spectrum of its "Think", "Build" and "Operate" offerings, i.e. from strategy formulation to solution implementation to continuity in maintenance support.

Systems Integration Strengths: TCS has vast experience and expertise in various legacy and enterprise systems. TCS has Centers of Excellence for different technologies

like Oracle Applications, E-Commerce, Microsoft VB, and Java, and can thus provide complete systems integration services.

Domain Expertise: TCS' CRM practice, along with the Banking and Financial Service industry practice, has developed CRM industry frameworks for banking vertical. These frameworks serve as references and help the project team in adding value to the assignment.

Quality Focus: TCS' commitment to Quality as a SEI-CMM Level 5 and an ISO 9001:2000 organization ensures that services delivered will adhere to well-defined processes and methodology. TCS is the world's first organization to achieve CMMI and the People CMM Level 5 integrated enterprise wide.

8 Representative CRM Project Profiles

Client	Project
Sanlam , South Africa	Customer Care Centre – Java Implementation
American Honda,US	American Honda Custom CRM implementation

9 Case Study

9.1 American Honda

Background :
American Honda is a leading automotive company operating 100 factories in 33 countries with Sales, manufacturing and research operations in US exceeding $5.9 billions

Business Objective:

- Adopt innovative customer relationship management
- Build upon brand equity
- Maximize customer satisfaction by optimising customer experience across all channels
- Provide best-in-class service by having accurate knowledge
- Provide consistent marketing message to customers by eliminating redundant communications and marketing expenses
- Improve lifetime owner loyalty

Business Requirements:

- Reduce marketing communications costs
- Reduce data management costs due to removal of duplicate and/or redundant data
- Improve customer identification and recognition; profile management
- Shared, operationalized, enterprise view of customer information integrated with web data
- Real-time (as needed) consumer profile management and on-line/off-line consumer relationship understanding
- Improve tracking of consumers who relocate and/or change contact information (I.e., name, etc.)
- Improve management of consumer privacy, permission and suppression
- Improve system availability for ad-hoc querying, reporting and analytics
- Reduce operational costs with existing analytical environment (Third Party DB) – other costs elsewhere

Solution Offered:
The solution will support on-line web interaction, integrate consumer information, reduce analytical & reporting latency and augment dealer leads

Before	After
Multiple Customer Database	Creation of Single Database
Historical Reporting and irrelevant operational reporting based upon data latency	Real Time Reporting and Feedback
Under-leverage Knowledge of Customer due to absence of customer profiling	Leverage knowledge of customer through segmentation

Poor Customer Identification Inability to identify duplicate customers, data latency of 45 to 60 days	Accurate Customer Identification

TCS Role :

Validation and Preparation

- Resolve all open Functional issues
- Baseline Requirement/Design & documentation updates

Performance Assessment

- System understanding and information validation
- Architecture, Design and configuration review, validate and modification
- Application code profiling and bottleneck analysis
- Recommendations and Validation

Testing

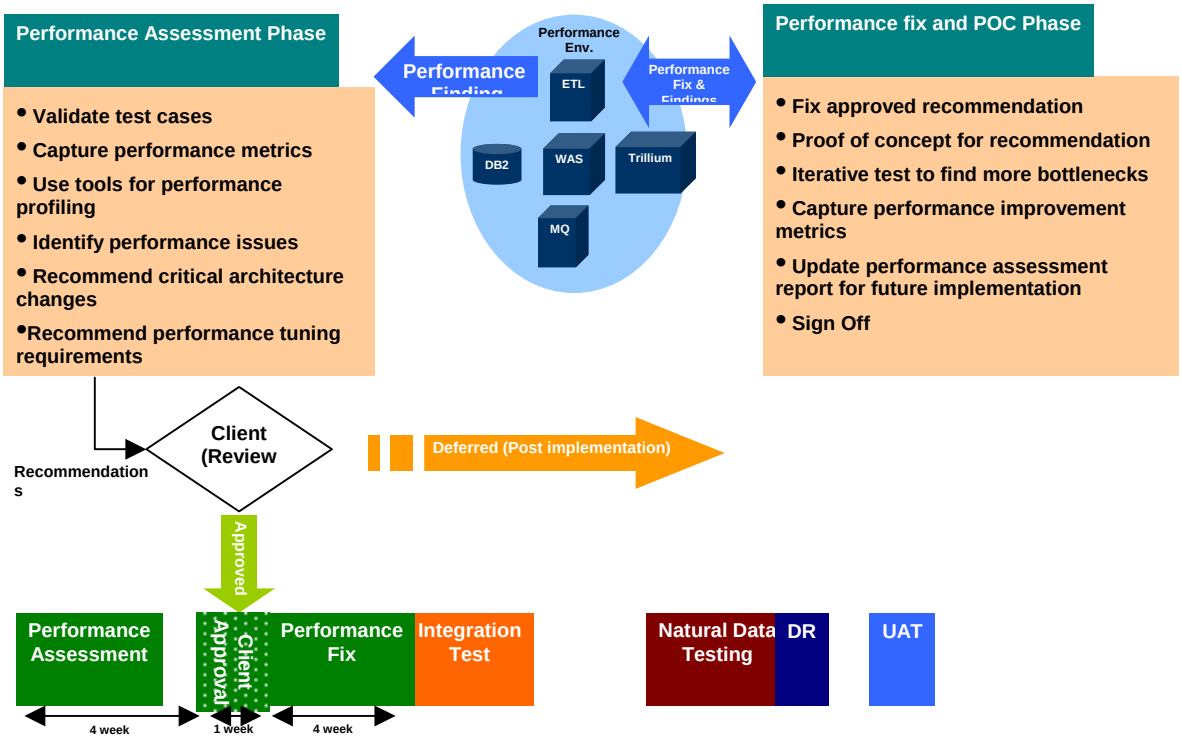
- Unit, Integration, System and Performance testing
- Dress Rehearsal for final implementation

Implementation and Go-live

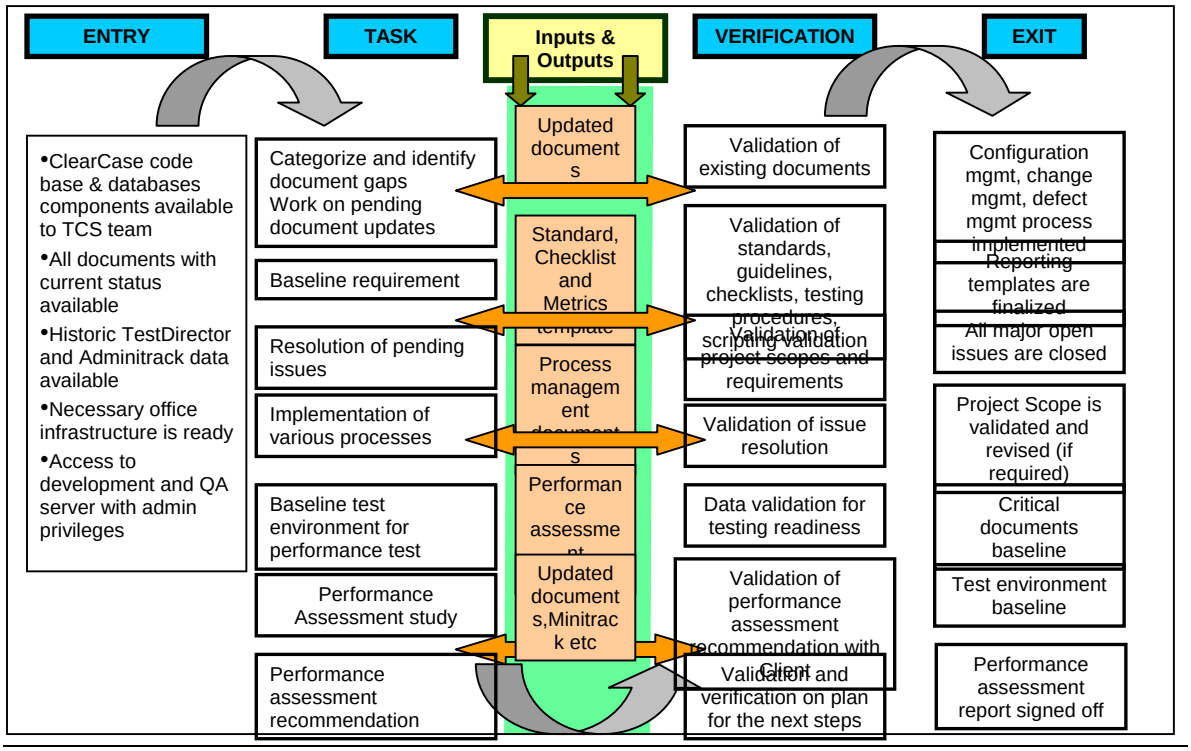
- Data Conversion
- Catch up jobs to include all non-converted data
- Production implementation and stabilization supports

Best Practices:

1. Performance Test Approach



2. ETVX Model (for each Phase) – TCS Standard



Benefits :

- Improved customer I.D. & householding
- Reduction in duplicate customer records
- Improved deliverability of mail & email
- Improved tracking of customers
- Reduced overall marketing costs and Inefficiencies
- Real-time reporting and campaign performance matchback
- Improved access to customer profile and interaction history
- Improved employee productivity

9.2 Sanlam

Sanlam	
Assignment Name: Customer Care Centre – Java Implementation	**Country:** South Africa
Location: Onsite: Cape Town, South Africa Offshore: Chennai, India	

Client Profile

Sanlam is the second largest Insurance and Financial Services Company in South Africa. Its core business operations are in the areas of Life Insurance, Administration, Actuarial and consulting services to retirement industry and money transfer services, Asset management, Investment banking solutions, Underwriting and Risk management to medical schemes, Property management services, Investment and portfolio management.

Description of the Project

Sanlam wanted to move away from the existing Siebel built application to a customized Java application based on the Service Oriented Architecture (SOA) developed by IBM. This was planned to ensure a sustainable technical platform to support future business requirements and to leverage the best practices provided by IBM's SOA group.

The existing Sanlam Siebel 2000 implementation consists of Siebel Insurance Service and Siebel Call Center. This in turn is integrated with various legacy systems catering to Policies, Claims, and Payments. Incoming media in the form of voice calls, letters from customers are integrated to the Media center that caters to the individual media type. There is a customer complaint module which is integrated to the service request section of the Siebel application.

At the moment the project is in the requirements gathering phase so the plan for development/testing/production is yet to be finalized.

The main objectives of the project were:-

- Build the entire Siebel Insurance Application with Integrated Call Center using the new SOA based solution.
- Any enhancements that is possible during the development of the new application to be incorporated and monitored.

Project Experience

At the moment the project is in the requirements gathering phase so the plan for development/testing/production is yet to be finalized.

Description of Services Provided by TCS

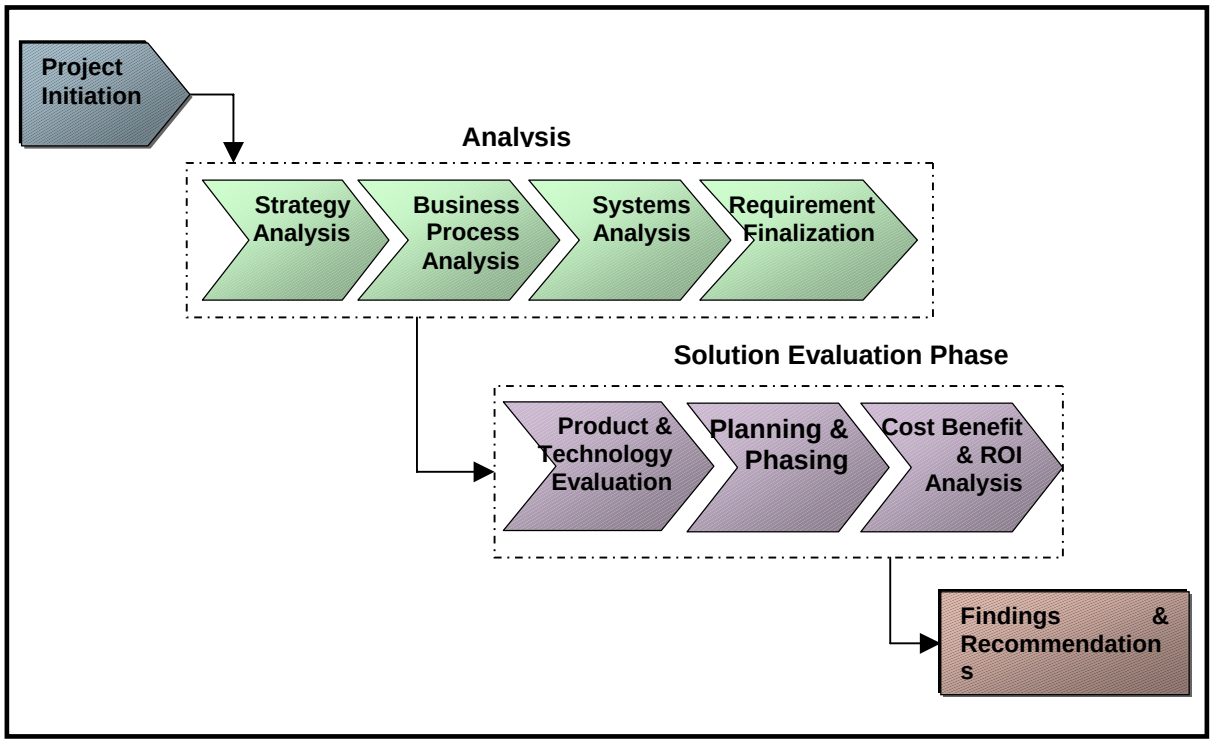
TCS is the only implementation partner for this project and is responsible for following tasks: -

- Gather customers' business requirements and develop the application using the IBM based SOA model.
- Provide the necessary expertise related to CRM and incorporate the same.

10 Appendices

Appendix A: TCS Custom CRM Strategy and Solution Evaluation Methodology

TCS follows its well established CRM Strategy and Solution Evaluation methodology as depicted below, for CRM consulting assignments.



A description of each phase is given in the following sections: -

Initiation Phase

This phase is initiated with assignment kick-off meeting and presentation. In this phase, the scope, work plan and timeline of the assignment are finalized and client's core team is established. During this phase, the questionnaires relevant to the process owners will be circulated and discussed. Client is expected to provide the existing technical and business procedure documents to TCS, which would be relevant to the assignment.

Analysis Phase

This phase consists of four sub-phases, namely - Strategy Analysis, Business Process Analysis, Systems Analysis and Requirements Finalization phase. These phases can be executed in parallel. The deliverable at the end of this phase would be the requirement document consisting of current and recommended business processes along with the high level CRM requirements. The detail of each phase is described in the following sections.

Strategy Analysis Phase

In this phase client's business goals, relationship goals, customer strategy and objectives will be analyzed. TCS consultants will understand client's customer profiles, products & services offered and the different channels of operation. Future business and growth plans will be discussed during this phase.

Business Process Analysis

The customer facing As-Is (existing) business processes of the organization are studied, understood, defined and documented in this phase. The issues and limitations of the current processes are identified and the To-Be (future) business processes are designed and documented. The impact analysis of changed processes is done as part of this phase.

Systems Analysis

This phase comprises of studying and understanding current implemented systems, future planned systems, their documentation/Technology Stack. TCS consultants will study client's existing systems – their functionality, modules, users, architecture and interfaces. This is done with a view to better understand the following: -

- Identify the systems to be affected by CRM
- Understand how the proposed CRM solution will fit in with or replace these systems
- Identify the integration issues with the proposed CRM solution

TCS consultants will meet with Technical/Systems experts from the client's side and also study the available systems documentation during this phase.

Requirements Finalization

In this phase business and technical requirements are discussed, prioritize, recommended and finalized. Requirements are prioritized in discussions with the business users and documented in the 'Requirements Document'. At the end of this phase requirements document is accepted and sign-off by the client and is used as the baseline for the subsequent phases.

Solution Evaluation Phase

The focus of this phase is to evaluate the best-fit custom solution for the client's requirements and the expected benefits from the same. This phase consists of three sub-phases, namely- Technology Evaluation, Phasing and Planning and Cost Benefit and ROI Analysis. The sub-phases subsequent to product and technology evaluation can be initiated in parallel.

Technology Evaluation

This phase comprises of evaluating the option of custom-built solution and the best-fit product/technology is recommended.

Phasing and Planning

This phase will sequence the steps to go from current state to the final state with the tentative timelines. The phasing will be based on business priorities and preferences, current technical architecture, existing business functionality and recommended solution.

The schedule and efforts are estimated for each phase. A high-level project plan is finalized during this phase.

Cost Benefit and ROI Analysis

In this phase TCS consultants will determine the CRM Total Cost of Ownership (TCO) based on recommended solution and factor in the business benefits to build a Return on Investment (ROI) based project justification. The underlying assumptions of benefits and the financial calculation basis will be built up in close consultation with the client's core team and Finance/ROI expert.

A TCO assessment for CRM initiative will contain the cost elements such as software and hardware cost, systems integration cost, internal staffing for the project, operations and support staff, training and change management etc.

Acceptable data for use in benefits calculation will be identified using available data from balance sheets and cash flow statements. Calculation of CRM benefits will involve gathering of pertinent data from the following departments: -

- Sales
- Operations
- Human resources
- Training
- Public relations
- Finance
- Marketing
- Customer service, etc.

The business benefits arising from the adoption of the CRM processes will be determined. Benefits will be classified into one of the following three categories: -

- Revenue enhancement (i.e. effectiveness and efficiency)
- Cost savings (or cost avoidance)
- Intangibles

Typical benefit examples include: -

- Efficiency
- Effectiveness
- Cost savings
- Intangibles

Once the cost and benefit data points have been agreed on, the consultants will work on the actual benefit calculation.

Based on the estimated costs and the identified financial benefits, a cost-benefit analysis will be undertaken on one or more financial parameters such as ROI, Payback Period and Net Cash Flow etc.

Findings and Recommendations

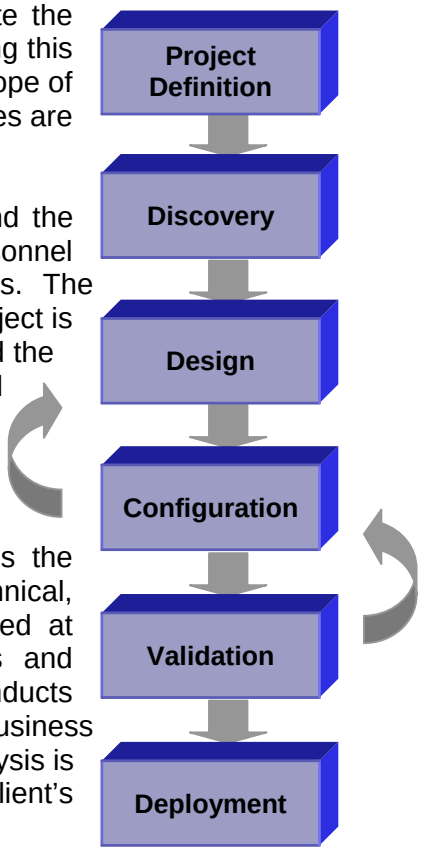
In this final phase, TCS will recommend to the client, which is the best fit custom-built solution product along with the technical architecture for the same. Report comprising of the analysis of the assignment will be prepared and submitted to the client.

Appendix B:TCS Custom CRM Implementation Methodology

The Custom CRM implementation methodology followed by TCS is comprised of activities grouped into six different phases as shown in the figure below. TCS aligned this methodology with an ETVX (Entry-Tasks-Validation-eXit) model that clearly defines the entry criteria, tasks, validations and exit criteria for each phase of the implementation lifecycle. TCS has evolved this methodology with experience of large number of implementations of various CRM products.

Project Definition Phase

The Project Definition phase comprises of activities that initiate the project and create the framework for the project execution. During this phase, the key business objectives of the client are identified, scope of the project is finalized, and Project management & control features are implemented. The CRM implementation team is organized.



During this phase, all project stakeholders will be identified and the roles and responsibilities of TCS consultants and Client Personnel would be determined and communicated to all stakeholders. The project management control structure needed to manage the project is defined. All required project-planning documents are created and the client's business needs are validated. The standards, tools, and other resources needed to manage and execute the project are identified.

Discovery Phase

The Discovery Phase comprises of activities directed towards the detailing of client's requirements. These include functional, technical, data, architecture and training requirements. They are arrived at based on a study of the existing processes and systems and discussions with users. The project team conducts discussions/interviews with the end users to understand the business requirements. Based on these requirements a detailed Gap Analysis is carried out to identify the differences between the client's requirements and features provided by the chosen CRM product.

Design Phase

The design phase involves designing a solution that will best fulfill the client's business requirements. This includes designing the user interfaces, navigation, application object layer, data model, business rules, interfaces to legacy / external systems and reports. In this phase, the team would also define the system architecture and develop the system and unit test plans.

Configuration Phase

During the Configuration phase, project team configures and customizes the CRM application, builds external interfaces, designs and develops interface and data migration programs and construct customized reports.

Validation Phase

The Validation phase involves carrying out a complete system integration testing and end user acceptance testing of the configured CRM application using test data.
In the System Integration testing phase, the components/interfaces will be tested for its business process compatibility. The test cases prepared during this phase are based on the business process rather than on system components. In the User Acceptance testing phase the client (user community) does the validation of the software to find out whether the solution provided is fit to use and satisfies their business needs.

Deployment Phase

Deployment phase involves commencing of the Production Pilot that would test the solution's readiness for a full production deployment. The Production Pilot is conducted in one part/area of the customer's business environment, which would enable a small section of the end users to work on the application, parallel with the existing applications. Based on their feedback, the configured application would then be rolled out across the enterprise. This phase also involves end user training, capacity planning, resource planning and initial data migration.

The Production Pilot offers a view into the production world. It allows all aspects of the new system (ease-of-use, response time, end user training, technical infrastructure, the network, and the helpdesk) to be field tested and revised before deployment to the entire organization. The Deployment phase on completion of successful production pilot focuses on a transition from the production pilot to a complete roll out to entire organization.