

PNC BANK

Flies High with WebFOCUS

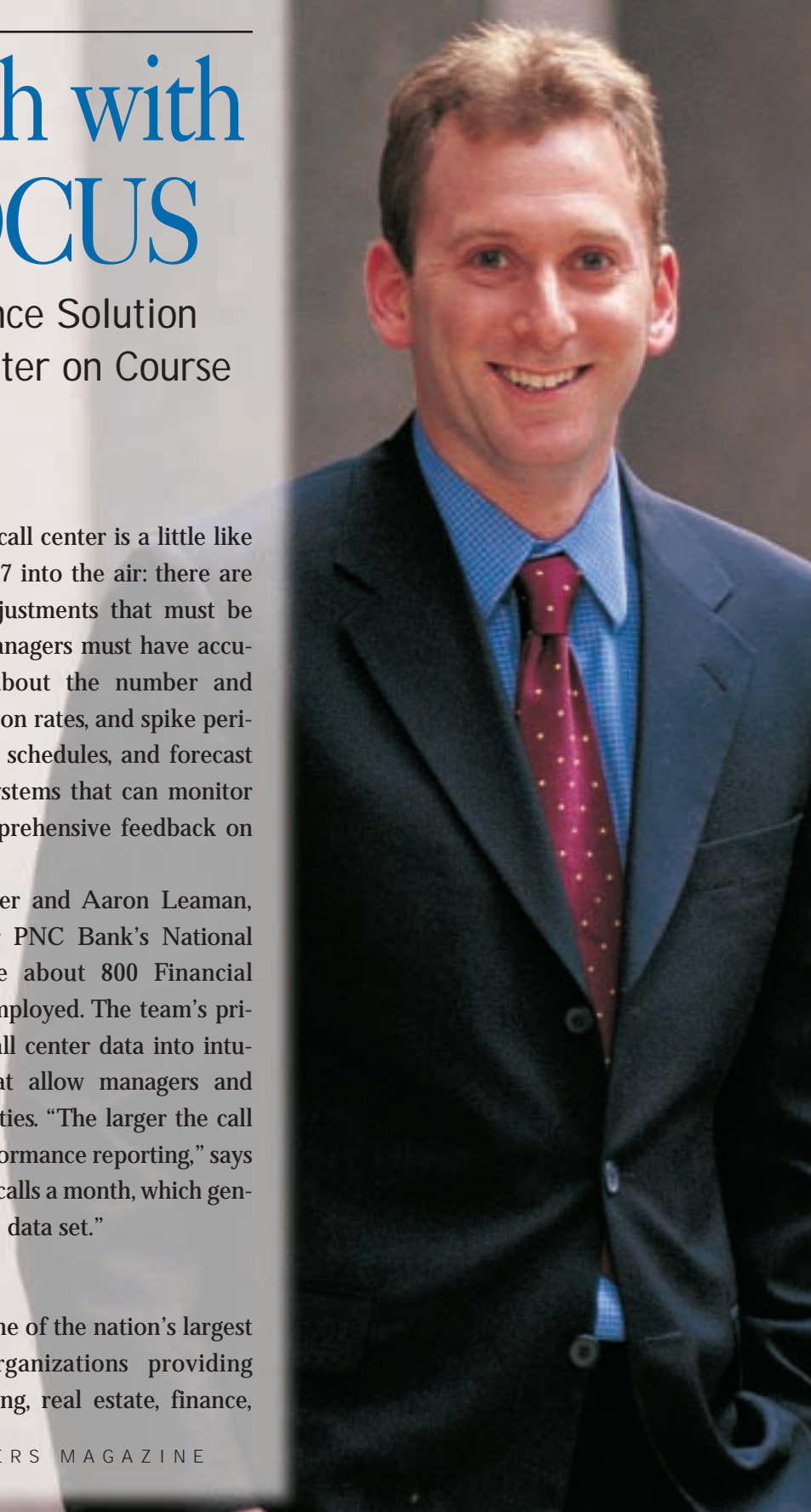
Business Intelligence Solution Keeps Busy Call Center on Course

Running an efficient call center is a little like getting a Boeing 747 into the air: there are lots of intricate adjustments that must be made on the fly. Managers must have accurate information about the number and types of calls, abandon rates, and spike periods so they can predict trends, set schedules, and forecast events. This puts a premium on systems that can monitor performance while delivering comprehensive feedback on call center activities.

Just ask the team of Adam Silber and Aaron Leaman, Performance Metrics Analysts for PNC Bank's National Financial Services Center, where about 800 Financial Services Consultants (FSCs) are employed. The team's primary mission is to translate raw call center data into intuitive, easily accessible reports that allow managers and agents to monitor call center activities. "The larger the call center, the greater the need for performance reporting," says Silber. "We handle almost a million calls a month, which generates an immense and very diverse data set."

Stalled on the Runway

PNC Financial Services Group is one of the nation's largest diversified financial services organizations providing regional banking, corporate banking, real estate, finance,



Performance Metrics Analysts Adam Silber (left) and Aaron Leaman envisioned a Web-based business intelligence solution that could simplify data access and distribution while streamlining the creation of custom reports...with WebFOCUS on their side, that vision became reality.



SNAPSHOT

Organization: PNC Bank National Financial Services Center, responsible for customer inquiries and transactions

Headquarters: Pittsburgh, Pennsylvania

Challenge: Provide a more responsive and comprehensive performance monitoring system for the call center

Strategy: Create online reporting system for performance monitoring, scheduling and business analysis

Results: Eliminated paper costs and improved efficiency for senior managers, call center managers, supervisors, and agents with instantaneous report distribution.

Information Builders Solution: WebFOCUS

private banking, asset-based lending, asset management, and global fund processing services.

Silber and Leaman were asked to set up a highly responsive performance monitoring and reporting mechanism, both for managers and FSCs. Unfortunately, the analysts hit a wall when they started to work with the call center's limited mainframe reporting system. "We were producing dozens of different reports for hundreds of people, most of whom were interested in only a subset of the data," explains Silber.

To complicate matters, the reporting data was scattered among many different applications and databases. "We had different people doing different types of analysis, and we were getting conflicting numbers from different sources," adds Leaman.

There was also a time and resource problem with the mainframe reporting system. Scheduling alone took one full day every two weeks. And once the jobs were scheduled and run, the resulting hardcopy reports weren't delivered until two or three days later. "This was entirely inadequate," notes Leaman. "Our service levels ebb and flow continuously, necessitating real-time monitoring. We needed a better reporting solution – ideally with built-in analytics."

Charting a Course

Silber and Leaman envisioned a Web-based business intelligence solution that could simplify data access and distribution while streamlining the creation of custom reports for managers, supervisors, and FSCs. "We wanted to get the right data to the right people at the right time, without requiring them to wade through bulky paper reports," Leaman sums up.

Silber was introduced to WebFOCUS at an Information Builders Users Conference and was immediately struck with its ability to meet their requirements. "As soon as I saw the demonstration, I knew this was the product we had been looking for," he relates.

The team considered business intelligence tools from Brio Technology and other software vendors, but they were convinced that WebFOCUS was the most comprehensive solution of its kind. "When we considered its rapid development capabilities and broad data access abilities, WebFOCUS was clearly the best Web reporting solution on the market," says Leaman.

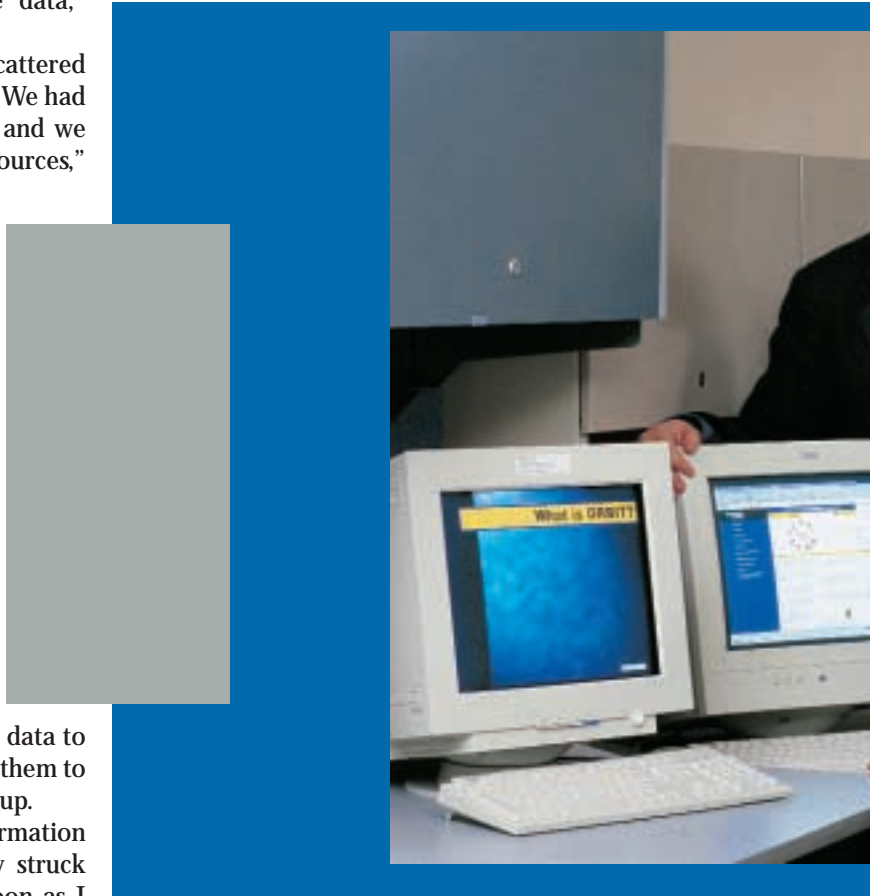
Getting Airborne with WebFOCUS

Once PNC Bank brought the software in-house, Leaman and Silber immediately went to work piloting the development of a new business intelligence system. They dubbed the project "ORBIT" for Online Report-Based Internet Technology.

First they installed WebFOCUS on a dual-processor

Windows NT server on the call center network, where 1,000 PCs are linked via Ethernet connections. Then they went to work creating new reports and analytical procedures. Most of the source data resides in flat files on the mainframe. Other data is drawn from Infoman, VSAM, and DB2 files.

Both Silber and Leaman were impressed with how rapidly they were able to develop applications using WebFOCUS. "Development time was almost nil," confirms Leaman. "With some applications, we were able to go from inception to production in a matter of a few weeks."



Finally, the team installed WebFOCUS Report Caster to simplify the process of distributing specific reports to specific groups and individuals. Report Caster gives PNC Bank exceptional control over when reports are run and how they are distributed. The content, timing, frequency, format, and even the method of distributing reports can all be easily managed and customized to meet individual needs.

"Any business that is modernizing has to find a way to pull together all of its different data streams, transform that data into information, and get it to a central point of access," Silber asserts. "Businesses can't make informed decisions if they don't have ready and comprehensive information to act on."

Reaching New Heights of Efficiency

WebFOCUS is helping PNC Bank to meet these information management objectives. A wide variety of reports are now being created and distributed at the manager level, middle-manager level, team level, and individual agent level. Security constraints ensure that users can only see information for which they are authorized. For example, FSCs can drill down to assess their individual performance, while supervisors have access to performance data about the entire group. Other reports are generated to relay schedule information. WebFOCUS is available on every computer

with which the call center can now respond to changing call volumes, assessing trends and making forecasts that allow them to be more accurate and timely in creating schedules. FSCs have their own personal Web pages where they can learn about scheduling changes, as well as gauge their performance against PNC's incentive plan. This helps maintain a high spirit of competition throughout the organization.

WebFOCUS has also demonstrated its worth as a business intelligence solution for call center management. "Everybody loves WebFOCUS," smiles Silber. "Call center managers and supervisors can effectively track each



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within the call center via standard Internet browsers.

"In the distribution of call center schedules alone, WebFOCUS has proved itself a remarkable solution," says Leaman.

Silber concurs, saying that ORBIT has taken PNC's call center operations to new levels of efficiency – eliminating paper costs, making report distribution instantaneous, and reducing staff overhead. "We've had WebFOCUS for only ten months and it has already paid for itself in terms of time savings, cost savings, and increased efficiency for our agents, their supervisors and corporate management," he says. "We are saving 50,000 pages of paper annually. Additionally, our two-person scheduling team has cut about 20 percent off the time we used to spend distributing the schedules."

One of the principal benefits of WebFOCUS is the speed

FSC's performance, and managers appreciate not having to wade through a truck-load of paper every week."

Silber and Leaman look forward to streamlining other operational functions in the future. "There is a lot we can do with this product," Leaman concludes. "WebFOCUS is extremely flexible on the back-end, in terms of all the different data sources it can access. And it has the business intelligence on the front-end to rapidly distribute information in a highly accessible format." 🌀