

Information Builders enables agile information solutions with the WebFOCUS business intelligence (BI) platform and integration technologies from iWay Software.

# WebFOCUS and iWay

For Customer Relationship Management (CRM)



Companies in every industry are being challenged more than ever before to sustain desirable customer retention and profitability levels. Maximizing customer retention is about building strong relationships, which is leading companies to adopt broad-reaching customer relationship management (CRM) strategies.

Successful CRM deployments provide customers with a 360° view from which they can measure customer analytics and manage portfolios. With capabilities such as customer-facing business intelligence (BI), electronic billing, and service/incident tracking, CRM can also enhance your customers' online experience.

With CRM solutions, information such as real-time point of sale, call-center performance management, and inter-store market analyses can be shared between agents, distributors, retailers, branch, and field staff. Risk and fraud management capabilities let your customers make predictions about behavior and perform customer scoring.

## A Robust Platform for CRM Reporting and Analysis

More and more companies that leverage CRM applications rely on the WebFOCUS BI platform from Information Builders to acquire the information they need to personalize and tailor products to their customers' needs and build strong, long-lasting relationships. WebFOCUS helps companies access and analyze data within CRM environments and other enterprise sources so they can better understand client requirements, predict buying patterns, and identify opportunities.

## Find Out More

To find out how our solutions can help your company succeed, talk to an Information Builders representative today. Contact your local Information Builders office, visit us at [informationbuilders.com](http://informationbuilders.com), or in the U.S. and Canada, call (800) 969-4636.

With WebFOCUS, organizations can:

- Access data in SAP, Oracle, and other CRM packages, as well as more than 300 other sources, and transform it into real-time, actionable insight
- Perform in-depth customer segmentation and analysis to implement more targeted and effective up-sell, cross-sell, and loyalty programs
- Monitor and manage support staff performance to optimize service delivery levels
- Provide customers with convenient self-service capabilities

### Cleaner Data, Better Decisions

While CRM applications have proven useful and necessary, they're only as good as their data. Data quality tools from iWay Software, an Information Builders division, ensure that information is pristine. iWay's Master Data Center (MDC) integrates with existing systems to consolidate millions of records, producing unified and validated master data that is instantly available to CRM applications.

iWay Data Quality Center (DQC) not only evaluates, monitors, and manages data quality in different information systems, but also prevents incorrect data from entering these systems. iWay DQC can be used to improve the quality of address and contact information; cleanse and unify customer data; validate and correct incomplete customer profiles; and validate customer data from self-service online applications.

### Information Builders CRM in Action

**Air Canada.** When Air Canada wanted to make it easier for travelers to make reservations, manage flights, and track associated costs, it turned to WebFOCUS to build a comprehensive and intuitive self-service reporting portal that provides around-the-clock access to booking details, corporate pass and frequent flyer usage histories, and more – all via the Web. The application has boosted sales, increased customer satisfaction, and further solidified relationships with key corporate clients.

**First Rate Investment Systems.** As a leading developer of portfolio analysis and performance measurement software, First Rate wanted to help its clients enhance service to their account holders. Using WebFOCUS, First Rate's clients can access in-depth details about hundreds of thousands of portfolios, perform batch reporting for tens of thousands of accounts, and enhance communication with clients by generating and delivering customized presentations.

**Pershing.** A top provider of clearing and financial outsourcing solutions, Pershing uses WebFOCUS to deliver a superior experience to tens of thousands of brokers and other busy clientele. Targeted analytical information allows customers to obtain aggregate views of account balances, financial holdings, and trades – information that previously could only be accessed through hard copy reports or standard files containing massive amounts of data. Brokers can also monitor transaction activity and perform complex "what if" queries regarding individual investor accounts.



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