

Information Builders and Customer
Relationship Management

WebFOCUS





The Power of Customer Intelligence

Competition has never been more aggressive and buyers have never been harder to please. Throughout all industries, companies are finding it more challenging than ever to sustain desirable levels of customer retention and profitability.

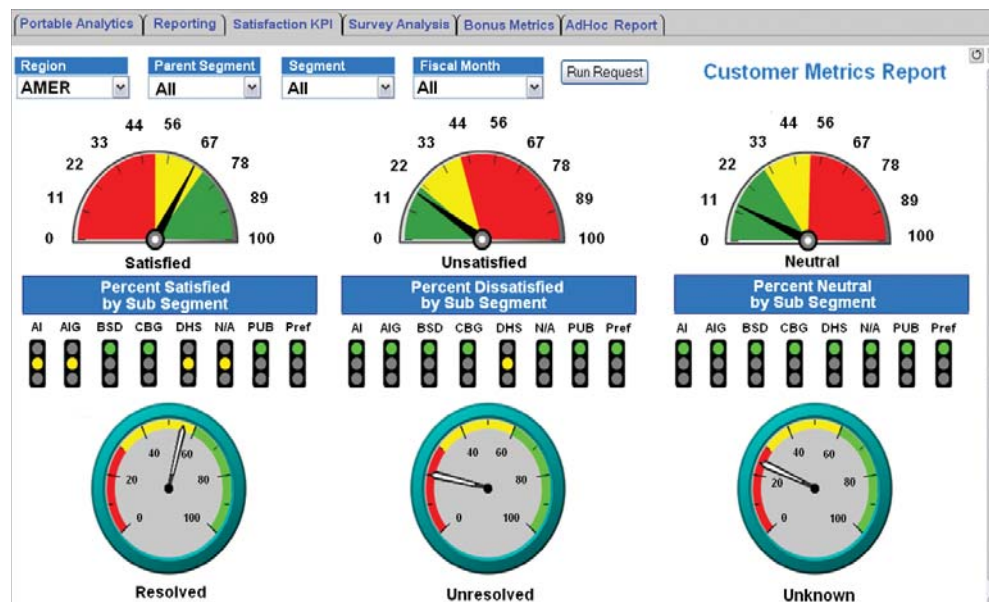
While minimizing churn and maximizing loyalty have always been top priorities, over the last decade it has become increasingly difficult for businesses to do so using traditional methods. Client needs change in an instant. Their behaviors are harder to predict, and their demands just seem to grow. As a result, it is nearly impossible to gain an edge through product differentiation or price cutting.

Maximizing customer retention is about one thing – building strong relationships. That’s why more and more businesses are devoting significant resources to the planning and execution of broad-reaching customer relationship management (CRM) strategies.

But CRM is about more than just implementing a back-end application. It’s about tapping into the information contained in those and other systems, and using it strategically for competitive advantage.

A Robust Platform for CRM Reporting and Analysis

The WebFOCUS business intelligence (BI) platform can help companies access and analyze the data within CRM environments and other enterprise sources, so they can better understand client requirements, predict buying patterns and other behaviors, and identify opportunities to expand their presence in existing accounts. Most importantly, WebFOCUS can help organizations build strong, long-lasting relationships by providing them with the knowledge they need to develop, market, and sell products and services that are more personalized, and more tailored to their customers’ needs.



With WebFOCUS, organizations can enhance their CRM strategies by:

- Accessing data in SAP, Oracle, and other popular CRM packages, as well as more than 300 other information sources, and transforming it into real-time, actionable insight
- Performing in-depth customer segmentation and analysis, to implement more targeted and effective up-sell, cross-sell, and loyalty programs
- Monitoring and managing the performance of support staff to optimize service delivery levels
- Providing customers with convenient self-service capabilities

As a greater number of companies place strong emphasis on CRM across their businesses, more and more of them are relying on WebFOCUS to acquire the timely, accurate, and complete information they need to build long-lasting and profitable relationships with their customers.



Customer Successes

Ainsworth – This renowned industrial services company wanted to better predict market fluctuations to achieve a competitive advantage. WebFOCUS-based dashboards for monitoring financials, billing details, customers, sales opportunities, contract renewals, and work orders have resulted in substantial improvements. Large projects are coming in under budget more often, invoices get paid faster, sales forecasts are more accurate, the number of billing disputes has been cut in half, and service contract renewals have risen from less than 70 percent to almost 100 percent.

Air Canada – Customer service is crucial to maintaining a competitive edge in the airline industry. When Air Canada, the world's 14th largest commercial airline, wanted to make it easier for both business and leisure travelers to book and manage their flights, and track associated costs, they turned to WebFOCUS. The powerful BI platform was employed 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 given a solid boost to 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 Investment Systems wanted to empower its client base, which consists of investment advisors and financial institutions, to enhance service to their account holders. By incorporating WebFOCUS functionality into their solution, the company has given clients the ability to obtain 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 that make portfolio information easy to interpret for investors.

Oxford Properties – As a leader in real estate management, Oxford Properties wanted to simplify day-to-day activities while facilitating expansion on a global scale. It used WebFOCUS to build Oxford Advanced Strategic Information Source (OASIS), an asset and performance measurement application that allows users to analyze tens of millions of square feet of real estate properties on a real-time basis. OASIS also includes a customer-facing portal that hosts timely, comprehensive reports about all facets of the business, such as tenants, outstanding bills, property histories, legal clauses, and company financials. This value-added service has set the company apart from its competitors.

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 trans-action activity – how many have been requested, how many have been processed, and how many are still pending – and perform complex “what if” queries regarding individual investor accounts. Best of all, these powerful analysis capabilities are accessible directly from within Pershing's existing broker workstation environment, making them not only convenient, but fast and easy to use.

Scotiabank – When its existing sales information hub proved ineffective, Scotiabank replaced it with one built on an iWay Software foundation. Automated product system feeds capture timely and accurate sales data from multiple banking systems and consolidate it into a centralized warehouse. From there, users can generate weekly sales reports, at the branch and individual banker levels, for its 1,000-location retail distribution channel. The company can now open new channels more rapidly, and sales staff no longer need to manually input and validate information, giving them faster access to results.

Security Check – WebFOCUS is helping Security Check to better assist its merchant clients with check collection activities. The company offers a wide array of services, including information that helps merchants avoid accepting non-sufficient funds (NSF) checks. With powerful business intelligence capabilities, Security Check has given customers unhindered visibility into all aspects of check processing, including driver's license numbers, telephone numbers, addresses, check amounts, check dates, charge-back dates, the dates they were entered into Security Check's system, and the current status. Additionally, they can closely track any returned checks. This, in turn, has not only improved customer satisfaction levels for the company, it has helped its clients identify repeat offenders, and simplify their reconciliation processes.

Staples Promotional Products – A specialist in the development and promotion of branded merchandise, Staples Promotional Products, uses WebFOCUS to support a variety of core business functions, including its client support services group. For example, consolidated business summaries, run on a monthly and quarterly basis by department analysts, give clients insight into total dollars spent, number of products shipped, returns, and other metrics. These reports are also distributed to marketing personnel, program managers, senior directors, and sales staff, who can use the information to make better decisions regarding their strategies. The company also plans to give customers direct access to certain reports that will highlight activity at their web stores, such as lists of recent shoppers, total visitors, promotions redeemed, orders invoiced and shipped, and available inventory.

Time Inc. – Customer support is crucial to the success of any sales rep, and those who sell advertising for Time Inc., the nation's largest magazine, are no exception. With WebFOCUS, the company has been able to make critical advertising reports available in just minutes. Information is gathered from numerous internal and external sources, including Competitive Media Reporting, a third-party provider of advertising expenditure data. Reps can then run a variety of reports, including a list of all magazines a specific company is advertising in, a list of all organizations that advertise in a certain publication, or all businesses that advertise a specific type of product. Armed with this intelligence, they can make more informed pitches to potential clients, while providing better service to existing ones.

U.S. Bank – WebFOCUS is the tool of choice for U.S. Bank, the sixth largest commercial bank in the U.S. Scoreboard, a Software-as-a-Service (SaaS) BI dashboard allows small business clients to instantly access their debit and credit card transaction data online, obtaining a customizable view of card payment activity, such as consolidated reports and statements. They can also conduct trend analysis and benchmarking against other companies in similar industries, or with similar geographic profiles. This value-added service has improved loyalty while reducing support costs.

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