How to **Improve Customer Relationship Management**
With Intelligence, Integrity, and Integration
What Our Customers Say

“Lots of investment firms have an engine that will calculate a rate of return. But very few have an automated process that generates customized presentations and delivers them to clients with minimal overhead. That is what Information Builders technology helps us do.”

Terry Gaines
Managing Director, Products Group
First Rate Inc.

“WebFOCUS is helping us give our current and prospective clients better information than any of our competitors, which helps us win their business.”

Paul Geiger
Director of Marketing, Advertising, and Research Systems
Time Inc.

“MyCentiMark makes it easier for large companies to manage their roofing projects. As a result, we are obtaining business from Fortune 100 corporations with property-intensive portfolios who are looking for better ways to manage their operations.”

Greg Wilson
Senior Vice President and Chief Information Officer
CentiMark

“[WebFOCUS] offers much greater flexibility, and there have been no scalability issues. We have made the look and feel very consistent with the rest of our broker workstation platform. This saves time and improves efficiency for our customers.”

Patrick Yip
Director, Technology Group
Pershing
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.

Though 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. It is nearly impossible to gain an edge solely through product differentiation or price-cutting.

Maximizing customer retention is about one thing – building strong, profitable relationships with existing and potential buyers. 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 a successful CRM initiative is about more than just implementing a back-end application. It’s about linking it with other important systems across the enterprise, optimizing the information housed within, and making critical customer-related insights readily available to all stakeholders.
Business intelligence (BI), integration, and data integrity solutions from Information Builders can help companies to access, analyze, and enhance 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, organizations can 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 our technologies, 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 assets – including cloud and social media 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
- Forecasting churn to proactively prevent customer attrition
- Providing customers with convenient self-service capabilities
- Ensuring the quality, consistency, and completeness of customer information
Customer Successes

**Ainsworth** – When this renowned industrial services company wanted to better predict market fluctuations to achieve a competitive advantage, it turned to WebFOCUS, our platform for BI and analytics. 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. Air Canada, the world’s fourteenth largest commercial airline, turned to WebFOCUS to make it easier for both business and leisure travelers to book and manage their flights, and track associated costs. WebFOCUS 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.

**CentiMark** – To improve service to large commercial clients, this provider of commercial and industrial roofing solutions used WebFOCUS to create a customer-facing web portal. Clients can now access information about inventory, budgets, condition reports, proposals, and history – all completely self-service and on-demand. This environment differentiates the company from its competitors, provides an ongoing point of communication with customers, and helps salespeople better understand each account’s property portfolio, so they can offer more personalized service.

**First Rate Investment Systems** – This leading developer of portfolio analysis and performance measurement software wanted to empower its client base, which consists of investment advisors and financial institutions, with the ability to enhance service to 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** – This leader in real estate management wanted to simplify day-to-day activities and support global expansion. 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 transaction activity – how many have been requested, processed, and still pending – and perform complex “what if” queries regarding individual investor accounts. Best of all, these powerful analysis capabilities are accessible directly from Pershing’s existing broker workstation environment, making them not only convenient, but also fast and easy to use.

Scotiabank – When its existing sales information hub proved ineffective, Scotiabank replaced it with one built on iWay Software from Information Builders. 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 members no longer need to manually input and validate information, giving them faster access to results.

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 strategic decisions. The company also plans to give customers direct access to certain analytics that will highlight web store activity, 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 nation’s sixth largest commercial bank. 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.
Information Builders helps organizations transform data into business value. Our solutions for business intelligence (BI) and analytics, integration, and data integrity enable smarter decision-making, strengthen customer relationships, and drive growth. WebFOCUS, iWay, and Omni products work together to seamlessly cover all your information needs.

**Intelligence**
The WebFOCUS BI and analytics platform delivers rich, consumable, interactive information to the widest range of users.

**Integrity**
The iWay Data Quality Suite and Master Data Management Suite enable profiling, analysis, merging, managing, and cleansing of data from any source – structured or unstructured. Omni applications enable a single, complete strategic and operational view of key business services.

**Integration**
The iWay Integration Suite is the most flexible and agile integration foundation available, providing interoperability between disparate systems and data for faster time to market on IT and business initiatives.
Intelligence, integrity, and integration solutions help our customers seamlessly navigate the full spectrum of information management for sharper insights and fact-based decision-making.

To learn more about how intelligence, integrity, and integration can help organizations to improve CRM, visit our online CRM Resource Center at informationbuilders.com/solutions/crm.
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