

## PSC Enterprise Solutions Case Study:

# Sales Scoreboard Portal Scores a \$3M Bottom Line Win

### The Problem...

With customer related information scattered everywhere throughout the business process, instant access becomes a problem. Improving access, both in terms of speed and completeness, enables the sales force to be more responsive and, therefore, more competitive, thereby increasing a company's market share.

Such was the business case for one client. They did not have a clear picture/identity of a typical customer. With customer related information scattered everywhere throughout the business process, instant access was a serious problem. Consequently, they were running their business looking through the rear view mirror. Here is their story about how they changed their "view" to looking forward through the windshield.

### The Situation...

The Client, a prominent consortium of insurance underwriters, needed a more proactive, 360-degree view of their customers with a primary focus on sales data. With customer data spread across more than 10 policy systems, they were unable to produce reliable data for their sales force in a reasonable timeframe. Running in a reactive state, they had to compile sales data manually at the end of each month for use by executives, data that was 15 to 30 days old.

To increase sales, the Client had to improve access, both in terms of speed and completeness, so the sales force could be more responsive and more competitive.

### The Solution...

PSC introduced a WebSphere Portal framework intranet solution to provide a single point of access for their employees. The solution had three distinct components that defined its overall value:

1) Superior Management Visibility - An aggregated view of account information.

The portal now provides better management visibility to vital information. Prior to having the WebSphere Portal solution in place, the Client's personnel had to access multiple policy systems in order to obtain a 'picture' of an account. Under the new solution, data from numerous back-end legacy systems is automatically exported and then imported

***"Not only did the Client get a 360-degree view of their customers, they saved \$3M in the process."***

into a DB2 data warehouse. These processes, deployed on WebSphere application servers, run on a prescribed schedule. With the WebSphere Portal solution, all of the information is aggregated into a single location – making it easier to get the 'big picture' on any account. By eliminating the effort required to research overall account activity, smarter strategic decisions can now be made. In the end, WebSphere Portal made it easier to make decisions that are more informed.

2) Improved Sales Performance - Greater sales force feedback for better results.

The increased visibility and aggregated information led to huge performance increases at the tactical sales level. By using Web-Services and click-to-action, information is now presented in a way that matches the individual sales person to the specific sales situation. Hence, the information is not only relevant and in context, but helps the end users to achieve their individualized personal goals.

3) Robust Architecture – An architecture that will support growth in a very scalable fashion.

Following the concepts of our own Content Progression Model (CPM), PSC Group delivered a portal infrastructure with a robust

Service Oriented Architecture (SOA) that will scale easily as the company continues to grow. Based upon IBM's strong middleware stack and WebSphere Portal, there is plenty of room to grow with boundless scalability. Old, and less reliable, linkages between legacy systems are now replaced by integration-at-the-glass. (The impact of SOA, Web Services and WebSphere 5.1 working together was so significant that plans are already underway to upgrade to WebSphere 6.0, which is even more SOA enabled.)

The solution, which was deployed to solve the people-centric information access problem, included a clustered, multi-tiered WebSphere Portal SOA-based design. Web Services deployed on WebSphere Application Server now provides data from all of the back-end systems. Portlet applications running on WebSphere Portal consume the Web Services data and present it to the end users. Collaboration was provided by Lotus Domino.

A key feature in the design was not to connect the portlets directly with the information/data source but to access the information via SOA. Doing this not only minimized the complexity and increased the flexibility, but enabled faster and easier upgrades as well.

All of the pieces were clustered for failover, reliability, and scalability. With role based access and integrated security, the resulting solution is more secure and the data is presented to only those that need to have authorized access. We conformed to all SOA guidelines.

### The Bottom Line...

Instead of relying on monthly, manually generated reports, the new solution provides real-time access to customer and sales data. This allows the entire sales staff to address their sales agenda proactively instead of taking a reactive

approach, allowing for a more concise and better-managed sales force.

Within the first six months of the implementation, the client realized a \$3M increase to their bottom line!

As one may expect, the Client also realized a significant cost reduction by eliminating the manual work. In addition to presenting the sales information, this system also used predictive business rules to help identify where policyholders may have additional needs based upon demographics thus

providing a tangible means of focusing on realistic new opportunities.

On the operations side, the sales staff now has up-to-date integrated information on their customers.

On the administrative and maintenance side, management is spending less time getting information and more time using it.

The Client is now capable of expanding their scope to include even more information for

better decision-making and continued business growth. The ability to join the architecture with end-user needs made the project an enormous success for the Client, as well as for IBM and PSC -- a great solution that brings money to everyone's bottom line!

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