行政院所屬各機關因公出國人員出國報告書
（出國類別：考察）

赴美國、加拿大考察專戶服務之規劃策略與建置── 以 CRM-Based 之專戶服務系統之規劃與應用 報告書

服務機關：中華電信公司
出國人 職 稱：總公司專戶處副處長 吳耀明
　　　　　　　總公司專戶處 科長 李鐘義
　　　　　　　北區分公司 科長 林美森
　　　　　　　總公司資訊處 股長 周晨旭
出國地點：美國、加拿大
出國期間：89 年 12 月 3 日至 89 年 12 月 16 日
報告日期：90 年 3 月

H6/c08907442

目　　　錄

壹、前言

　　新固網民營公司即將於本新世紀年初陸續通過驗證，核准投入國內電信市場參與營運競逐。由過去行動電話市場開放自由化後之激烈競爭情形及本次固網經營家數開放情況看來，國內固網市場競爭之白熱化以不言可喻，我中華電信如何固守原有客戶，強化本身之產品品質及服務效能，進而開發符合市場需求新服務以增裕公司營收，於競爭中益發突顯中華電信在電信市場中不可取代之卓越領導地位，除了需要更彈性的策略應用外，更踏實的建構可強化整體行銷效能之基礎工程，以充份瞭解客戶需求，快速滿足客戶需要，根本性改善企業經營效能，爭得客戶信賴，已是刻不容緩。

此次奉准運用 88 下半年至 89 年出國考察編號 190 號："考察專戶服務之規劃策略與建置" 乙案預算，引伸考察 "客戶關係管理系統"，即是衡量在未來的整合通信與資訊之整體服務需求與電信競爭市場之下，已顯現出針對企業客戶之攻防現象，企業客戶市場將是各家固網業者必爭之地，依據此一 20/80 理論原則及長官們的重視情形，我中華電信除應加強固守原專戶市場外，配合 90 年度專戶處營運計劃，在洪處長的努力協調下所研擬之專戶服務行銷策略，更擬建置 CRM Based 之專戶客戶服務資訊系統，以強化提供專戶服務銷售自動化，以及專戶行銷分析與策略智慧化，期以擴展服務所有重要企業用戶，以提高企業客戶滿意度，進而增裕公司營收。

此次奉准出國考察同行共四人，行程安排即是依據上述旨意，將參訪之主要重點瞄準在 CRM 之 Solution 領域之深入瞭解及國外相關經驗之擷取，考察地點主要為美國舊金山矽谷、加拿大溫哥華及美國紐約/波斯頓等地，遍訪北加地區電信、資訊業中 CRM Solution 及使用者之領先、代表廠家，如 Metaedge、Kana、Nortel NW、Clarify 、Onyx、Lucent 等公司。

貳、行程概述

12/3	台北 --- 舊金山	啟程
12/4～12/5	舊金山矽谷	參觀 MetaEdge /Kana 公司，研討 CRM 系統之規劃與建置。
12/6～12/8	舊金山矽谷	參觀 Nortel 公司 NW、寬頻 IP-VPN 與 Clarify Briefing Center 之 CeBA 系統規劃與建置。
12/9（六）	舊金山---加拿大	行程
12/10（日）	溫哥華	整理資料
12/11～12/12	溫哥華	研討 Nortel e-Bus 及參觀 Onyx-eCRM
12/13～12/14	紐約/波士頓	參觀 Lucent 公司 ONP 及 isoftel 產品，研討 e-bus 平台與 CRM 之應用探討。
12/15～12/16	紐約 --- 台北	返程

由本出國考察所見及與訪談者討論心得，將可大有助於本公司 CRM Based 專戶客服資訊系統之規劃及建構，以下各章節即針對出國期間訪談所見整理後提出報告。

參、考察美加地區 CRM 系統規劃與應用內容之報告

一、CRM(Customer Relational Management)概述

1.什麼是 CRM？
實際上 CRM 是一種企業文化、知識及資源的整合運用，特別是指應用在與『企業--顧客關係』有關的活動上，例如『如何發掘潛在客戶』、『如何適切適時地滿足客戶需求』、『保持客戶忠誠度』及『創造企業--顧客雙贏之企業價值』，這些都是建構 CRM 時之重要課題與思考方向。

2.為什麼需要 CRM？
電信民營化、固網業務的開放（東森已於 90.1 月取得交通部核發之經營權）已日漸逼進，激烈的市場競爭將是一種無法避免的常態，從大哥大業務客戶的爭奪戰已經清楚証明『客戶才是企業生存的命脈』，因此『CRM 客戶關係管理』自然變成不可忽視的一環，也是我們未來努力的目標。

『客戶的滿意是中華電信的責任』。本公司的核心競爭力除了企業文化、優秀人才及經營策略外，最重要的應該是『現有的 1900 萬個用戶』，故如何繼續『保有老客戶、開拓新客源』就成為公司最急迫的議題及策略準則。毛 董事長亦曾說:『鞏固市話、扳回行動』，明確指出未來之經營方向，而要達成 董事長的指示唯有儘速建置一整合性之『CRM 客戶關係管理系統』方能事半功倍，為公司創造永續經營的契機。

3.CRM 之目標
①One-stop shopping（一次購足）、Total solution（整體服務）
　　註：摘錄自遠見雜誌 2000/11 月號『專訪中華電信 毛董事長』
②鞏固舊用戶、贏得新客源
③不分大小、一體服務:不管是重要大客戶（VIP :專戶 CRM）、社區大樓（Group CRM）或一般小眾（Public CRM）皆能經由適當管道及機制，得到最適切的服務。
④整合現有系統、創造客戶價值:整合 Call Center，Legacy system，Data warehouse，二代網路櫃台、HiNet 等系統，以期提供自動化、智慧化之高品質服務功能。並與『顧客共創競爭力』達成 Win-Win 雙贏之企業價值。

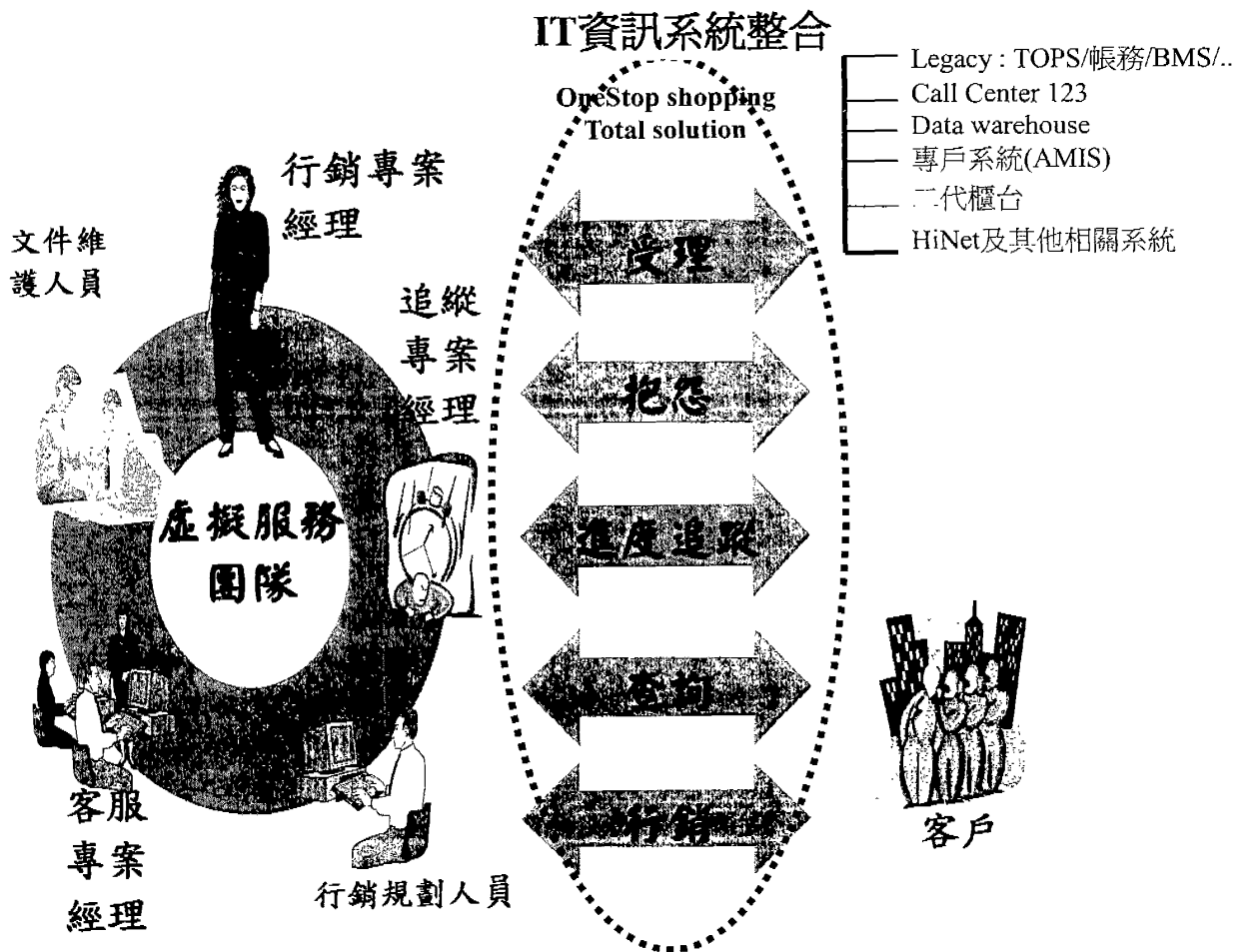### 4.CRM 成功之四大關鍵要素
①企業定位、文化價值:『過去：產品導向。現在：應以顧客需

求為導向』，結合全公司之資源（包括人力、物力及財力）應用
於顧客最需要的關鍵點，才能符合企業經營之策略方向。

②暸解客戶、創造價值：開發客戶終身價值（Lifetime value of a
customer）已是企業生存之不二法門。

③流程再造、組織調整：以顧客需求為根本考量，提供最適切的
作業流程（必要時修訂），同時組織應做局部調整以因應此一新
功能之服務。

④IT 系統整合：提供自動化之 Total solution

以 VIP：專戶 CRM 為例其服務機制架構如下

IT資訊系統整合

OneStop shopping
Total solution

受理
抱怨
進度追蹤
查詢
行銷

Legacy：TOPS/帳務/BMS/..
Call Center 123
Data warehouse
專戶系統(AMIS)
二代櫃台
HiNet及其他相關系統

行銷專案經理
追縱專案經理
文件維護人員
虛擬服務團隊
客服專案經理
行銷規劃人員
客戶

## 以"虛擬服務團隊"為客戶提供單一窗口之服務模式

二、MetaEdge

2.1 公司背景

由華裔人士所位創立的捷智商訊（MetaEdge），1995 年成立於美國加州矽谷，由兩位留美傑出之華裔青年電腦科學家所創立，初期定位為資料庫與資料倉儲科技顧問公司；MetaEdge 台灣分公司於 2000 年 7 月成立，國內的合作伙伴包括有台灣優利系統、漢康科技、兆太科技，並仍繼續尋求資料倉儲軟體技術上的合作伙伴。該公司累積在電信業與金融業的顧問經驗，並架構出產業經營模式，以自行研發的資料倉儲後端分析引擎 C-Insight，協助企業導入客戶資料分析系統，按該公司宣傳資料，其建置所花的時間比資料庫廠商還要短。目前捷智商訊將亞洲總部設於台灣，並計劃在香港、韓國、中國、日本及新加坡等地設立分公司；主要客戶除積極與本公司接觸外，並包括太平洋貝爾電信（Pacific Bell）、嘉信理財（Charles Schwab）、安泰人壽、日本NTT 電訊、韓國電信與新加坡電信等。日前曾宣布協助國內台新銀行及其所屬新光集團建立集團旗下所有企業共享的資料倉儲系統。

為瞭解 CRM 後端分析 Solution 工具之技術、經驗及意見，此次考察行程即將 MetaEdge 列為第一站，並獲得該公司產品開發主任胡博士之熱忱解說，收穫良多。

2.2 MetaEdge 之產品技術

MetaEdge 所提供之 Solution 主要在其號稱擁有多項專利之C-INSIGHT 產品，該公司稱企業發展 e-businesses，與客戶建立一對一關係過程中，Customer intelligence 已經成為致勝關鍵利器。 MetaEdge 以 C-Insight Solution 快速提供企業用戶去瞭解其 e-customers， 協助其分析、選擇關鍵的 business decisions，以創造客戶最大的 lifetime value。

C-Insight 呈現了一項新的 e-customer profiling 觀念，使得e-businesses 能始終環繞在以 customer-centric 為中心之思維。該套工具主要之功能包括了：Recency、Frequency、Monetary(R.F.M.)、Customer Lifetime Value (LTV)、CustomerProfitability Analysis 及 rule induction 等 features。

**The MetaEdge
C-Insight Solution**
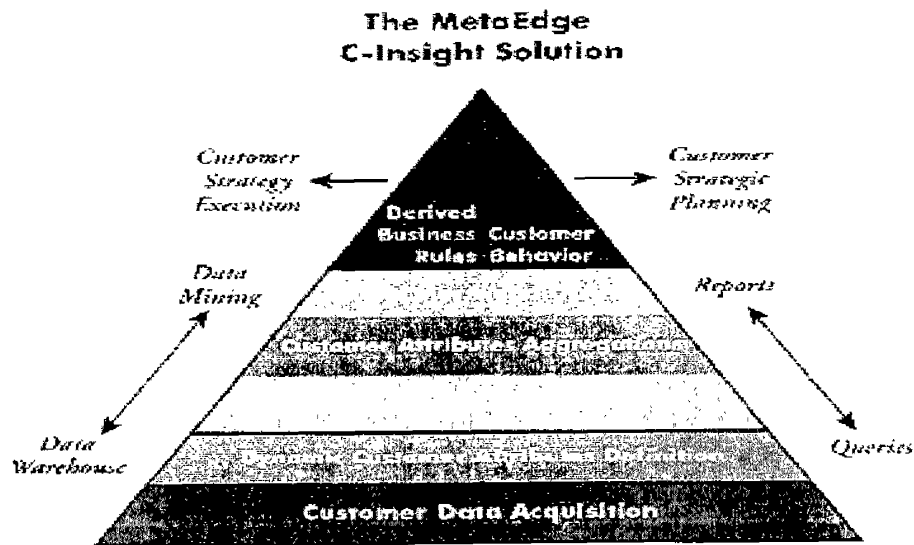
MetaEdge 應用 C-Insight 支援各式決策支援系統（decision support system），使能產生閉迴路決策支援效能（To enable closed loop decision support），並可利用其 Object 架構整合前後端應用系統，強化了 customer intelligence 及 business operational 效能。

C-Insight™-- MetaEdge 採用特有 RSS(Reverse Star Scheme:Many to One)之建置專利等技術,提供 customer intelligence solution，整合了不同之顧客資料，主要提供下列分析功能：

①Dynamic customer attributes based on events, activities, and transactions.
②Dynamic customer segmentation.
③Customer valuation and scoring.
④Customer migration rates.
⑤Dynamic OLAP reports based on dynamically created customer profiles.
⑥Customer Retention.
⑦Business Rule-induction.

MetaEdge 之產品特色如下：

2.2.1 Customer Intelligence 作業平台
①Dynamically Extensible Customer Information Store
②GUI Design Studio for Customer-Centric Data Warehouse
③Integrated Customer Data Consolidation and Movement

④Automatic Customer Database Construction
⑤GUI and Wizard-based Configuration Management for
　　Customer Intelligence Modeling and Analytical Functions
⑥Distributed Object Oriented Architecture and Interfaces to
　　E-commerce and other Customer Management Applications

2.2.2 Customer Activity/Event Correlation
①Time Sequence Analysis for Customer Activities and Events
②Cross Business Function for Customer Life Cycle Analysis

2.2.3 Online Customer Segmentation Framework
①Dynamic Customer Profiles Creation and Update for
　　Segmentation
②Schedule and Task Management for Pre-Calculation of
　　Customer Segmentation
③Customer Segmentation Caching Capability for High
　　Performance and Fast Analysis
④Customer Profiling Metadata Repository for Business Rule
　　Management

2.2.4 Multiple Customer Intelligence Analysis Models
①Customer Scoring Model
- Retention, Attrition and Migration Rate Analysis
- Profitability Gain Table
- Buying Propensity
- Customer-Centric Balance Score Card
②Dynamic Customer Profiling Model
- Recency, Frequency, Monetary (RFM) Model
- Retention, Attrition, Migration Rate Analysis
- Demographic, Geographic, Psychographic, Responsegraphic
Analysis
- Customer Life Time Value (LTV) Analysis
- Customer Profitability Analysis
③Time Sequence Correlation Model
④Customer Behavioral Association Model
- Market Basket Analysis
- Customer Profiles
-　Product Purchasing Association

2.2.5 Rich Set of Pre-built Quantitative Analytical Functions
①Conventional Techniques
- Percentile
- Cumulative

8

- Ranking
- Range Brackets
②Statistical Techniques
- Histograms
- Sampling
- Pareto
③Data Mining Techniques
- Decision Tree
- Affinity Rules
- Classification and Clustering
- Sequence Pattern Analysis
- Fuzzy Logic (Future)
- Genetic Algorithms (Future)
- Neural Network (Future)
④Time Series
-   Moving Average (Future)

2.2.6 Dynamic Customer-Centric Data Mart Builder
①Customer-Centric Data Mart Designer
②Dynamic Generation of Customer Data Cubes:
- Cubes with Customer Dimension or Customer Profile
Dimensions
- Cubes Pertaining to Certain Customer Segment
- Customer Behavior Cubes that Show Customer Behavior
Trends Based on Dynamically Created Customer Profiles
③Dynamic Cube Management
④Support MOLAP/ROLAP/HOLAP
2.2.7 Seamless OLAP and Reporting Tool Integration
①OLAP Meta Data Integration with OLAP Tools
②Integrate with Web-based OLAP and Reporting Tools
③Integrate with Desktop Office Products such as Microsoft
    Excel 2000
2.2.8 Distributed Customer Intelligence Delivery Architecture
①Dynamic Cube Delivery on-Demand or on-Schedule
②Integrate with Internet-based Delivery Mechanisms including
    email and Dynamic Web Page Generation

2.3 MetaEdge 協助企業建置客戶資料倉儲方法

捷智商訊協助金融企業建置客戶資料倉儲專案通常分為四個階段，第一階段先信用卡客戶資料的建立及整合，第二階段是加強前端客戶服務及行銷規劃的電子化作業，第三階段導入企業及個人金融用戶資料，第四階段建置資產負債管理系統及客戶貢獻度分析系統。在 solution 提供方面，捷智商訊的客戶資料分析解決方案，包括建立資料倉儲與後端分析引擎 C-Insight 的建置。

據該公司主管表示，當企業建置好企業資源計畫（ERP）、供應鍊（SCM）、客戶關係管理（CRM）系統後，企業資源仍分佈於不同的系統，無法提供決策者最精確的分析結果或報告，企業所累積的資源無法發揮最大的效益，資料倉儲整合企業所有資訊，為企業分析提出最佳的決策選擇，並可預測企業未來趨勢。

三、 Kana

3.1 公司背景

Kana Communications, Inc. 成立於 1996 年，定位為 software provider（Broadest range of Communications and Relationship Management Software）。該公司位於 Silicon Valley(U.S.A)並擁有 1200 名員工及 350 名工程師，Q3/2000 Revenue US$40M （去）年成長 975%以上，是一家潛力十足前景相當看好的新興 e 時代之軟體公司。
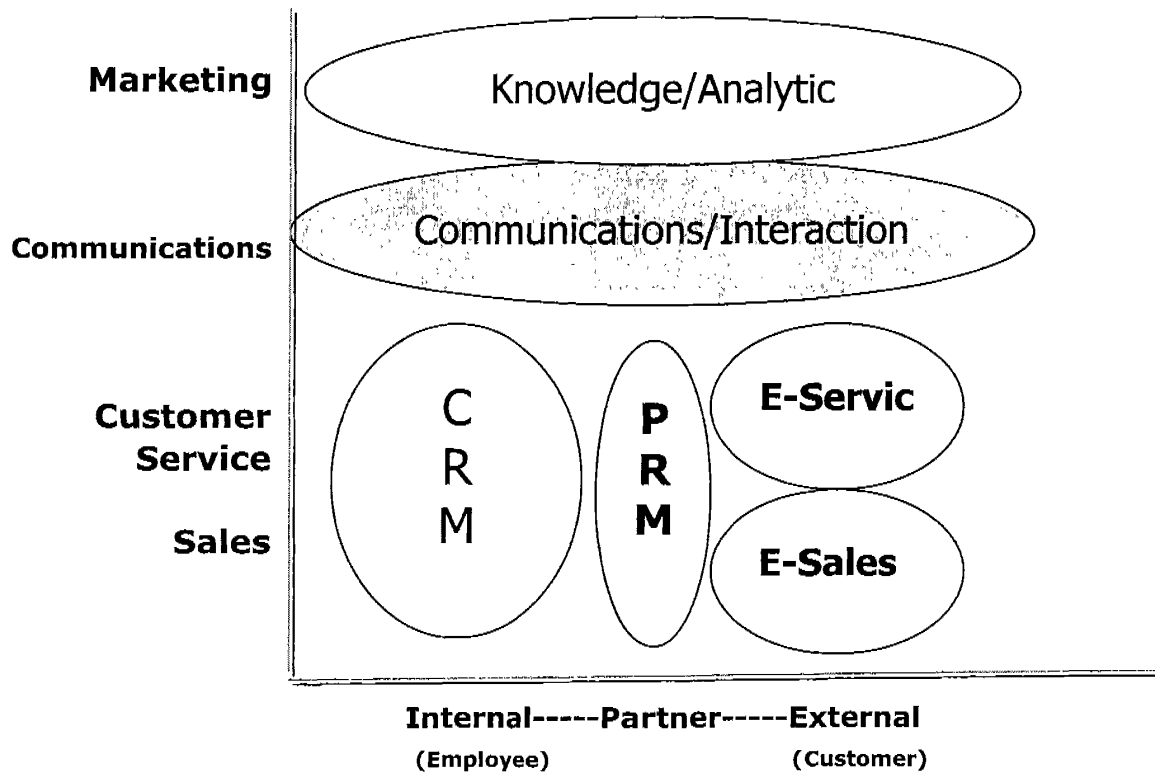
3.2 產品功能

eRM：Enterprise Relationship Management

3.2.1 Kana『eRM 客戶服務』基本理論架構
Kana 的 eRM 特別強調『Communications is Key』，其重點簡述如下：

① 建立對內部員工之溝通機制：Employee communications（Internal CRM）
② 建立對協力廠商之溝通機制：Partner communications（Partner CRM：PRM）
③ 建立對終端用戶之溝通機制：Customer（External eService /eSales）
④ 整合『顧客溝通三大種類』：Customer Service、Sales 及 Marketing，以達成主動行銷之解決方案
⑤ 結合既有或建立公司之 Knowledge DataBase，如 Customers Profile，Data warehouse，Web-based online support assist
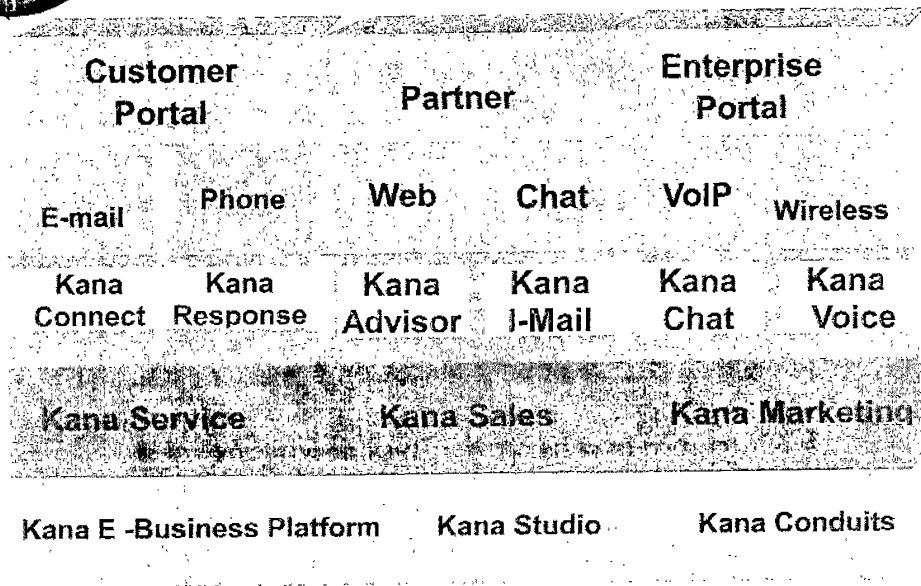
可由下圖得知其基本概念：

eRM: Communication is Key

Marketing

Knowledge/Analytic

Communications

Communications/Interaction

**Customer
Service**

C R M

P R M

E-Servic

Sales

E-Sales

Internal-----Partner-----External
(Employee)   **(Customer)**

(Source: Yankee Group – June 2000)

3.2.2 Kana 產品功能特色
①Global view for customers, partners and the
enterprise，如建立 customer portal, partner portal 及
enterprise portal。
②多管道之互相溝通方式：可提供 e-mail, phone, web-base,
chat,voip 及 wireless 等既快速又方便之 communication
channels。
③interaction methods：assisted, virtually assisted, Self
Service & Proactive
④提供整合性 e-business 解決方案
⑤彈性的網路系統架構：N-tier Web-architected Platform

可由下圖得知其基本功能架構：

Kana's eBusiness Products

Customer Portal	Partner	Enterprise Portal

E-mail	Phone	Web	Chat	VoIP	Wireless

Kana Connect	Kana Response	Kana Advisor	Kana I-Mail	Kana Chat	Kana Voice

Kana Service	Kana Sales	Kana Marketing

Kana E -Business Platform	Kana Studio	Kana Conduits

由上圖可明確暸解 Kana 試圖提供一組全方位之 Total solution ，其產品有

①Kana e-Business Platform

②Kana Response：high performance E-mail Customer Service

③Kana Connect：permission-based marketing，build customer profile, analyze response rate „etc.

④Kana Advisor

⑤Knan I-mail：real time assisted service

⑥Kana Phone：CTI integration

詳細之各項功能描述，請參考附錄。

四、Nortel-Clarify

4.1 公司背景

Clarify 係 Nortel Networks 公司於 2000 年 3 月 新成立的事業部，全名為 Clarify eBussiness Application Unit，提供各大企業以及服務業者電子商務和客戶關係管理方面的服務，以及建立虛擬的網路市場。這個新部門並且與 Anderson Cousulting 結盟，為全球各公司提供專業的服務，包括新進的電子商務策略及技術。

Nortel Networks 的總裁表示，該公司將客戶關係管理、客服中心、網路中心、以及高效能的網路結合，帶領電子商務第二波潮流。他更進一步表示，為了讓虛擬的網路世界更為真實，完美的電子商務解決方案憑藉著較佳的經濟以及品質，必須要能提供更為可靠，更安全，更快速的服務。

Nortel Networks 整合高效能的網路、客服中心，Clarify 的客戶關係管理解決方案，以及 Periphonics 先進的語音辨識系統，極具發展潛力。Clarify 在全球將會有 2600 名員工，其目標客戶為遠景前 500 大企業。

4.2 Nortel Networks 推展 eBussiness 成功的優勢

4.2.1 成功的合作夥伴關係
Alton
Architel
Clarify
EPICON
Periphonics

4.2.2 功能完整的 eSolution 新產品
eFrontOffice 9.0
Wireless Field Services
Voice Enhanced Sales Force Automation
Web Center Portal
Optical Service Management

4.2.3 忠誠的客戶群
金融業:
Lloyds TSB Group
Merrill Lynch

Salomon Smith Barney
TRW Inc.
高科技業：
Compaq
    EMC Corp
    Fujitsu Lid
    NEC Corp
服務業：
    Cable& Wireless
    Concert
    Country Road
    NBC
    Tyco
    US Postal Service
    7-Eleven. Inc.

4.3 產品特點－Clarify 的解決方案

銷售應用：提供銷售程序自動化的完整系統，被稱為「ClearSales」。

行銷自動化應用：提供最佳的產品促銷管理與市場分析工具，使用「MarketFirst」能區隔特別的客戶群，並能追蹤計畫、管理以及執行目標的達成。

客戶服務與支援應用：提供整合客戶服務與申告管理的解決方案，藉由整合專戶服務管理系統及通訊網路，提供單一窗口，客戶需求與客戶申告的報表，被稱為「ClearSupport」之客戶服務解決方案重點之一為創新個人化銷售與作業。

客服中心：Call center 提供客戶呼叫分配到適當的受理席。在值機員跟客戶打招呼前，他們已經知道客戶來電的原因，可以做立即且有效的處理。被稱為「eFrontOffice」可以經由 email、網頁提出需求，以及網頁 call me 等。

業務資料分析功能：提供處理大量資料正確分析的能力。

網路支援功能：透過網際網路（Internet），依據客戶需求提供個人化的網頁，客服中心人員並可與客戶交談。

電子商務：eFrontOffice 是 Clarify'CRM 的重心，包括下列應用項目：
Clarify eConfigurator
Clarify eOrder
Clarify eMerchandising
Clarify eBusiness Framework

- Clarify eSupport
- Clarify eManger
無線通訊：包括 **WAP（Wireless Application Protocal）電
話、Windows CE 、Pam OS** 設備以及無線通訊技術。

CRM 前端作業模式：

Customer Information Model

Self-Support　Knowledge Portals　Self-Service Applications　　Merchandising　　Orders

Front Office Applications

Call Center　Sales & Marketing　Technical Support　Field Service & Logistics　Contract Management　Quality Assurance　Internal Help Desk

Customers　Virtual Enterprise Collaboration　Back Office Integration
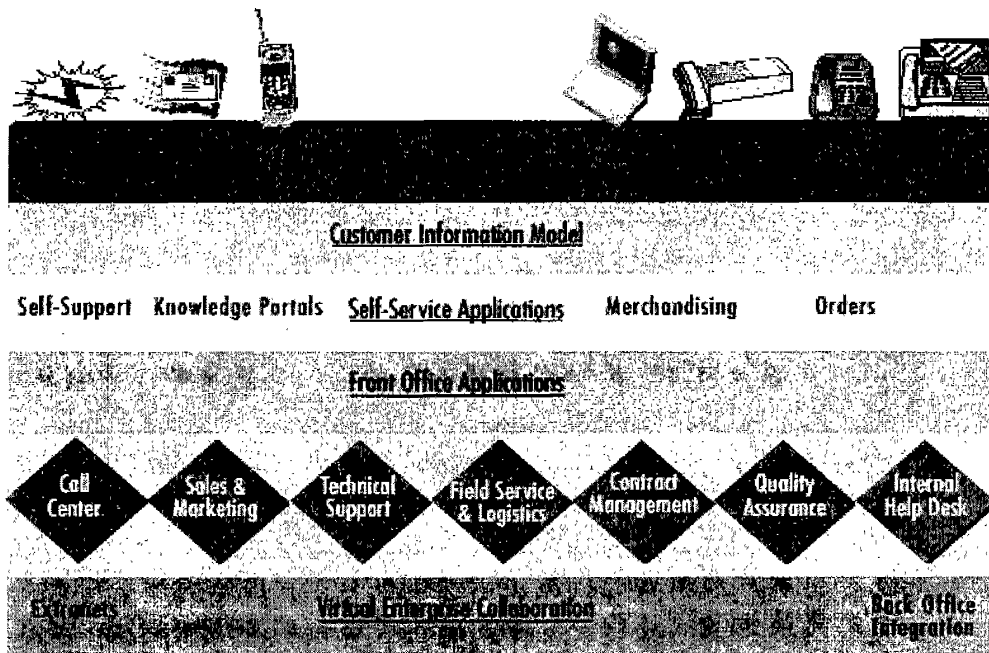
五. ONYX

5.1 公司背景

ONYX, Inc.（U.S.A）擁有 750 名員工，Q3/2000 Revenue US$32.8M 並且在可預期的未來，將有很大的成長空間 ，是一家獲利力極高前景可期的新興 eCRM 軟體整合公司。

ONYX 之產品亦多次贏得國際大獎，

如 **1998 SPA CODIE Award**
1999 Best Company to Work For 1999
2000 Best Customer Relationship Portal
等等，皆可証明該公司之產品自有其優異可取之處。

5.2 產品功能（整合性全功能之 CRM Solution）

5.2.1 產品目標
①提供企業（用戶）一個整合性資訊系統架構（integrated infrastructure ），以期能擁有獨特的『市場競爭優勢』，企業方可『永續經營、創造價值』
②對內整合『Sales, marketing, customers services and e-business functions』，能夠快速及正確地滿足顧客需求
③整合所有 communication channels：Phone, mail, e-mail, web-based and Fax,,,etc.可由下圖窺知其基本概念：

ONYX Solution

Web   E-Mail

Marketing   **Sales**   **Service**

Mail   **Phone**   *Fax*
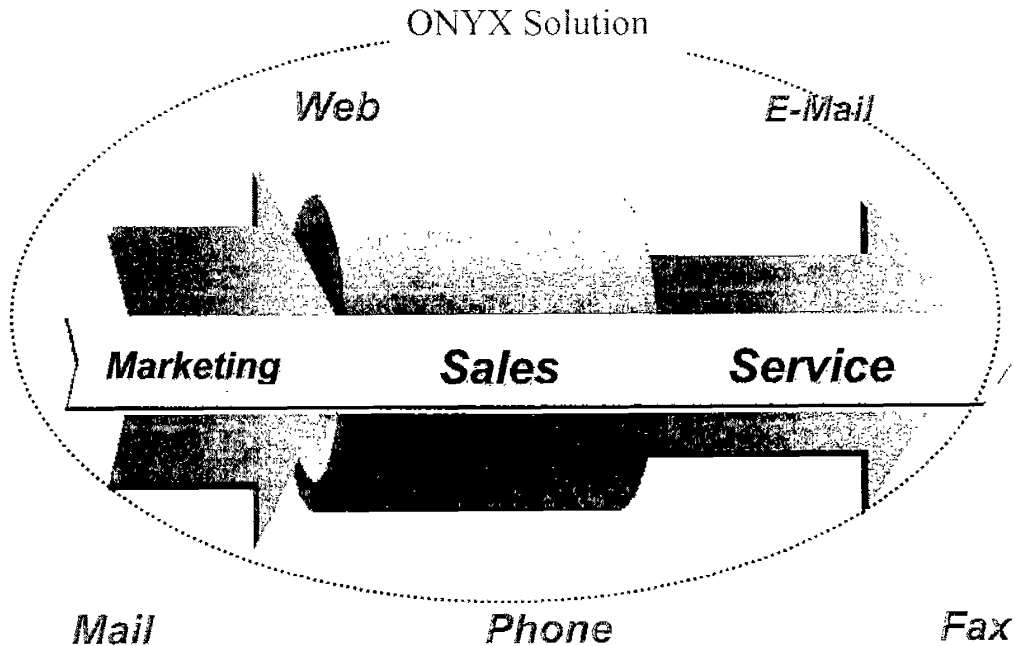
5.2.2 ONYX 整合產品特色

① 全方位客戶服務入口網站：以 ONYX e-Business Engine 為核心技術，建立 customer portal, partner portal 及 employee portal。

②Integrated multi-access channels：可提供 Hand-held Device, Call phone, outlook, Office-client, Desktop-browser, web-Kiosk/TV。

③interaction methods：assisted, virtually assisted, Self Service & Proactive

④ 整合性 Back-office, Front-office and 之解決方案

⑤ 加值型服務功能：結合企業之 ERP, HR(人力資源), Data warehouse, and Reseach 等，可進行 1-1 Marketing，Sales forecasting, Self-service,,etc.

5.2.3ONYX 整合系統架構：

Employee Customer Partner

PC - Desktop   Web Portal   Wireless

Back Office   Front Office   Business Intelligence

Accounting

Inventory

Mfg/Dist

Supply chain

Compensation

HR

Marketing
Sales
Service
Partners
Customers
Vendors

Reports

Data Mining

Mktg Encyc

Doc Mgmt

News

Research
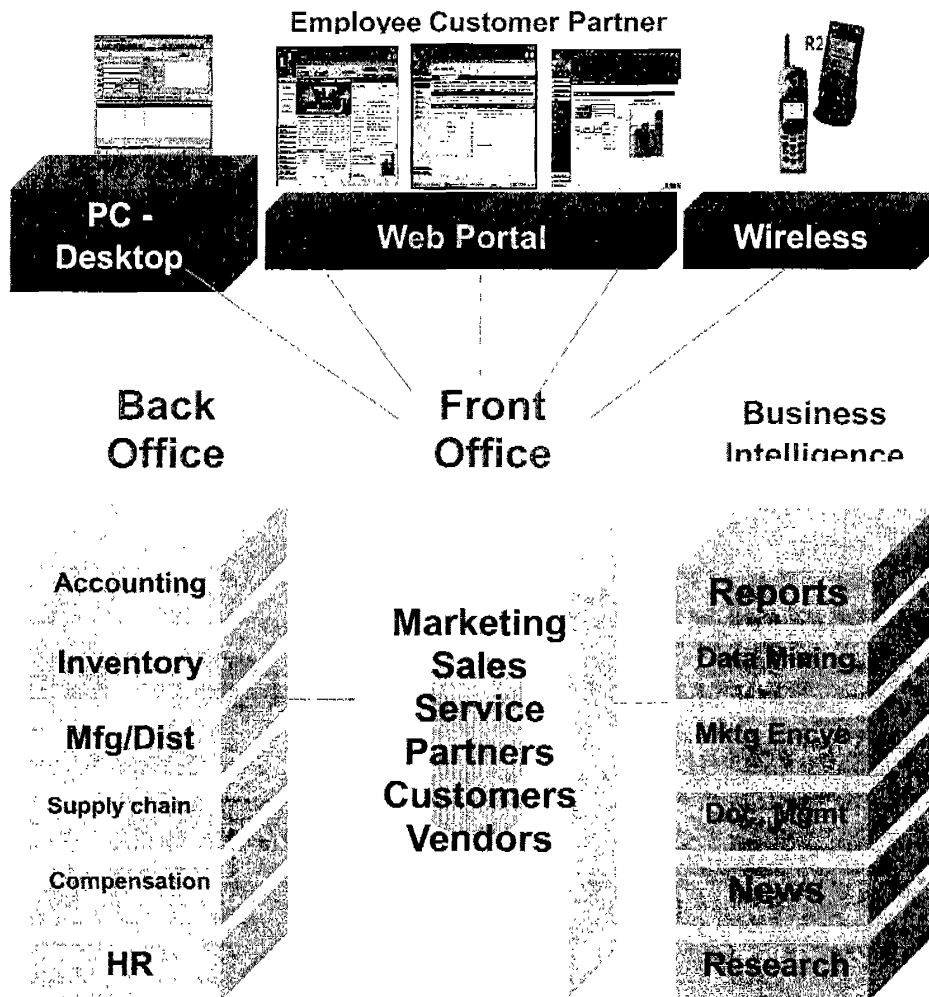
5.2.4 ONYX 產品細部功能簡述

ONYX 產品特點在於『整合資源及應用服務』。為建立與維持企業的競爭力，最根本的要件為『對外：滿足用戶需求、掌握時代潮流』，『對內：整合企業所有資源，提供必要之服務功能』。而 ONYX 之產品恰好正可符合此種條件：『將顧客溝通三大種類：服務（Customer Service），市場（Marketing）及業務推廣（Sales）』完全緊密整合、充分運用，以應付新經濟時代的需要與挑戰。

功能簡述如下：

①顧客溝通之一 Marketing functionality：一對一行銷（1-to-1 marketing），市場分析及預測（analysis and reporting），促銷活動規劃及控制（campaign management）等功能。

②顧客溝通之二 Sales functionality：通路管理（channel management），營運預測，客戶管理，產品資詢服務及 e-commerce 等功能。

③顧客溝通之三 Service functionality：客戶關懷服務、客戶基本資料建檔及分析應用、主動創造客戶價值及 Problem resolution 等功能。

六. Lucent Technology

6.1 CRM起源

顧客關係管理(Customer Relationship Management CRM) 最早開始發展的是美國，在1980年初期便有所謂的「接觸管理」(Contact Management)，專門蒐集顧客與公司連繫的所有資訊；至1990年初期演變成為包括電話服務中心(Call Center)與支援資料分析的客戶服務功能(Customer Care)

6.2 CRM之應用範疇

以顧客為中心的經營策略使顧客與企業建立緊密的關係，互相有對等的了解及良好互動，進而達到

—企業能配合顧客需求，提供一致、高品質的互動接觸

—提供可信賴、個人化或企業客戶的全方位整體服務，並透過改善後的客戶經驗，提高客戶忠誠度與維持企業經營成長

6.3 市場動態：以下為未建置CRM客戶服務系統之分析

—店頭軟硬體供應商Front-Office Vendors→企業關係管理Enterprise relationship management→Customers

—企業情報供應商Business Intelligence Vendors→顧客資料分析Customer data mining→Customer

—組織整合軟硬體供應商Vertical Application Vendors→Customers

—網路/電子商務軟硬體供應商Web/e-Commerce Vendors→個人服務Self-service→Customers

—辦公室內務軟硬體供應商Back-Office Vendors→企業資源規劃ERP Plus→Customers

—工作流程管理供應商Workflow Vendors→Customer workflows顧客服務流程→Customers

—知識管理供應商Knowledge Management Vendors→Customers

—應用軟體整合供應商Application Integration Vendors→Customers

—客戶服務中心供應商Call Center Vendors→客戶接觸中心Customer Contact Center→Customers

—電腦資訊整合CTI供應商→Customers

6.4 CRM轉化技術（以客戶為中心）
—店頭軟硬體→Customers
—企業情報→Customers
—組織整合軟硬體→Customers
—電子商務→ Customers
—辦公室內務 → Customers
—服務流程 → Customers
—知識管理 → Customers
—應用軟體整合 → Customers
—Group ware群組用軟體→ Customers
—客戶服務中心/電腦電話整合 → Customers
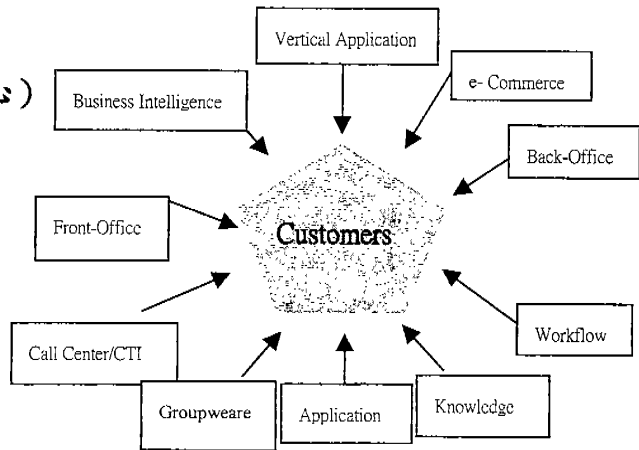
6.5 CRM轉化關係架構

CRM理想的客戶互動：
顧客面對的是一個公司；面對顧客的服務人員，充分了解顧客整體關係，二者享有相同的資訊。

<u>轉化前</u>	<u>轉化後</u>
由疏離的客戶關係	轉為親密的客戶關係
。非個人化的關係	。一對一的關係
。對客戶看法不一致	。對客戶持一致的看法
。拙劣的溝通	。提供完整諮詢的溝通
。無區別性的服務	。依客戶貢獻度提供相對服務
企業內部與客戶有關各單位獨立運作	企業內部各單位以一個整體回應應客戶

6.6 改變(Change) / 機會(Opportunity)
★改變
—您的企業正在轉變！「改變」是當今企業所面臨的最大挑戰
•變動的經濟環境
•產業的重整
•持續發展中的技術
•產品、服務品質的發展

●新的競爭者

—您的顧客也在轉變！
●更多選擇
●更具知識
●可及性：時間／媒介
●加強的服務
●更多需求

—您的員工也在改變！
●工作技能
●招募與訓練
●管理與保有最佳的人才
●需要更好的工具
●員工自主

✪機會
—改變可以是好的：改變 ＝ 機會！

提昇效率		提昇客戶忠誠度
提高選擇性	**Your Customer**	投資保障
提供新的客戶服務	**Your Enterprise**	彈性與信任
願景	**Your People**	夥伴關係

以因應企業面臨的挑戰

6.7 企業的機會
　—提昇作業效率
　—提昇員工生產力
　—提昇顧客服務

—掌握並善用商機

—提昇作業效率
。降低對談時間與網路費用
。使員工更有生產力
。開始就將客戶要求轉給最恰當的員工處理
。發覺並解決問題
作業成本評估：
。將每筆轉換成本降至最低
。共有目標
範例
。用IVR應用軟體取代人員處理
。以CTI為導向的螢幕畫面視窗，聲音／資料傳輸
。作業整合

—提昇員工生產力

—選擇適當的資源
。以員工的技能為考量
。以員工的所在地為考量
。以服務對象的喜好為考量
。以服務對象的貢獻度為考量
。以時間（如當天時段、當週時段）為考量
—最佳的服務人員或是最有空閒的服務人員
。外國語言的喜好
。產品／服務的專業知識
。為解決之問題／可能更多困難
。區域族群的專長
。指定服務人員
。客戶關係
。「自動服務」(IVR)偏好
。另一地點的服務人員
—昇顧客服務
。留住貢獻度最高的客戶
。超越客戶的期望
。與競爭者作區別
。隨時準備因應未來的變化

—客戶進展層級
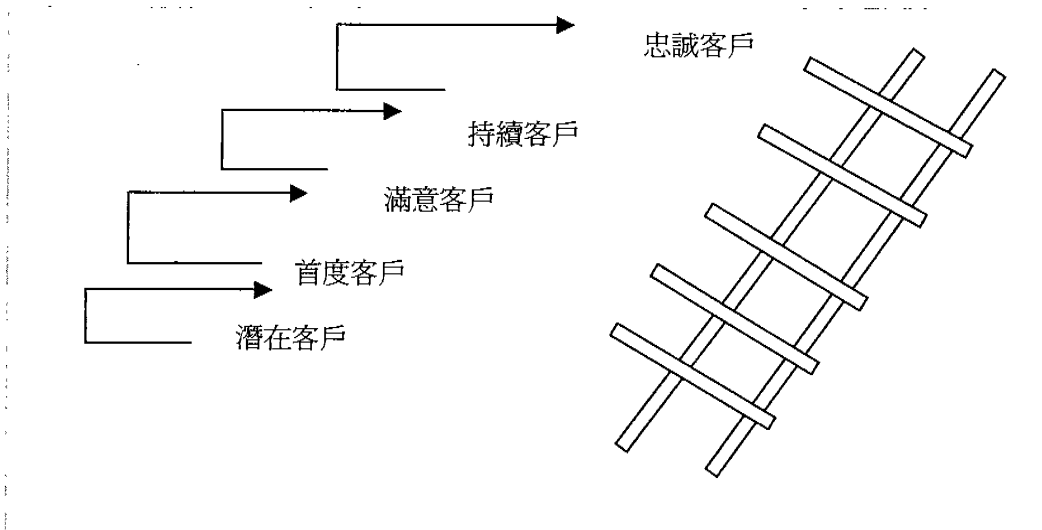
—客戶服務可提升客戶保留度
　。保留客戶較開發新客戶有經濟效益
　。保留滿意的舊客戶成本，只需開發新客戶成本的五分之一
　。20/80理論
　　。高忠誠度客戶較不受價格之影響
　　。建立個人關係；讓客戶習慣您的服務
　　。指認高貢獻度的客戶
　　。瞭解你公司20%高貢獻度客戶的成功密訣！
—回饋忠誠客戶
　。創新；尋求省錢的方案(流程改進，策略聯盟)
　。提高客服標準
　。提供具選擇性服務，新方案，優先等級
—掌握並善用商機
　。認清每個客戶溝通的真正價值
　。發展一套策略，內容必須清楚定義call center的目的
　。運用科技
　。深入了解好客戶，積極和客戶鞏固關係，為企業產品或服務開
發新用途

6.8 Call Center: 策略性的工具
　。Call Center應當是且必須是企業與個別客戶關係的轉接中心
　。Call Center提供業務人員一個獨特的機會與客戶直接產生互動
　。每一個進來的接觸都是一個很大的機會
　。Call Center可以協助任何企業，不分大小，對客戶關係、客戶
　　量、與產品或服務供應量產生大幅進展。

● 香港電信(Hong Kong Telecom)
  營業辦公室One-stop shopping in Hong Kong
  挑戰—
  •每月9百萬次通話
    。尖峰時段每小時3萬五千次
    。24小時營運
  •30多個call center地點，超過2500工作人員
  •超過2000種產品與服務
        。多重服務熱線
        。多種系統整合
  •新的競爭者
  •不一致的客戶服務
目標—
  •對每一階層的客戶提供最佳服務
  •成為一個有效率的銷售管道
  •提高成本效益
  •To rationalize accomodations（空間區位合理化 ?）
  •善用並強化員工
  •善用最新科技
  •發展單一窗口熱線服務
  •提供24小時服務
原有設定—
  •沒有整合的服務熱線
  •許多handoff（轉接服務 ?）
  •沒有來源與資料的整合
  •許多等候時間
  •重複的人力與設備
  •不一致的工作流程
        →109: 障礙台
        →1028: 商業用戶查詢
        →1000: 住宅用戶查詢
        →010, 011, 012: 國際電話值機員服務
        →1800: Starline 服務查詢
        →013, 014: 國際電話／傳真查詢
        →27103838: 帳單查詢

→1081, 1083：查號台
←電話行銷
對策—歸整＝效率
- 四個以網路串聯的Call Center設備
- 約1500個工作人員
- 用單一軟體介面處理全部的業務
- 全面提供〝單一窗口〞One-Stop Shop服務

客戶來電事項—
- 電話號碼查詢
- 國際電話號碼查詢
- 熱線查詢
- 帳戶查詢
- 產品與服務查詢
- 國際撥接服務
- 行動電話用戶服務
- 網際網路與Interactive TV

對外連通事項—
- 電話行銷
- 電話費催繳
- 使用或其他調查
- 服務費用
- 策略聯盟或合作廠商產品（如Interactive TV）

Hong Kong Telecom CFO 收穫—
對客戶：
- 減少等待時間
- 無須對不同服務人員重複說明
- 減少hand-off

對員工：
- 增進工作發展
- 由於額外的激勵而提高收入
- 較高的工作滿意度

對公司：
- 客戶滿意度提高
- 組織的效率提高
- 節省成本
- 增加收入

- Sitel
  挑戰—
  •多國語言、高科技客戶
  •多處（地點）作業
  •競爭激增（傾向Outsourcing）
  目標—
  •區別大小、服務、與技術優先
  •處理快速成長
  •達成不同層級客戶的需求
  對策：Outsourcing – 將客戶服務交給專家—
  •使用Expert Agent Selection選定了解客戶語言，專案，或特殊技能的人員以提供服務
  •使用IVR搭配能辨認多國語言的系統作初步的轉接
  •持續成長與全球優良形象

- CRM 科技......
  —使客戶能透過不同的方式與企業聯繫
  —使企業能了解客戶喜好的溝通方式
  —提供工具使企業能有效運用資源，同時提供客戶高效的服務
  —使企業能達成營運目標

考查公司簡介
- 朗訊科技股份有限公司 Lucent Technologies
  朗訊科技前身為AT&T，擁有享譽全球的貝爾實驗室Bell Labs，朗訊科技於1983年與中華民國政府簽訂合作投資備忘錄，1985年在台灣成立美台電訊股份有限公司(Lucent Technologies Taiwan Telecommunications Co.ltd)，目前合資夥伴—中華電信。

- AVAYA Communication
  AVAYA Communication前身為朗訊科技的企業網路集團 (Enterprise Networks Group)，所提供之通訊服務著重於〝人際關係與溝通〞，目前全球約九十餘國上萬家企業採用AVAYA所提供之服務，其中包括45%的前五○○大公司。

肆、心得與建議

　　此次赴美加地區考察行程緊湊，共參觀考察了北加地區電信、資訊業中CRM Solution及使用者之領先、代表廠家，如Metaedge、Kana、Nortel-NW、Clarify、Onyx、Lucent 等公司，從客戶服務系統網路平台，到電子商務、客戶關係管理等應用系統，深覺收穫不少，可作為本公司規劃設計與建置CRM系統之參考。

從此次考察所見，國外各具有規模之企業無不加速建置其客戶關係管理系統。論者表示，CRM不只是一種技術，CRM也是一種管理藝術、一種方法論（Methodology），尤其重視與客戶、員工及合作廠商之互動關係，近來結合網際網路技術，朝向eCRM發展，強調Customer portal、Employee portal及Partner portal 三者之融合發展。並整合後端相關支援系統，建置資料倉儲（Data warehouse）、即時共同資料庫（Common Database）與專戶資料超市（Data mart）。換言之， 只有滿意的員工才能造就高滿意度的客戶，只有能合作無間互相信賴的合作夥伴，才能成就高信賴度之客戶。

為提昇本公司企業客戶之服務效能，以加強企業客戶服務及行銷為目標之CRM Based 專戶客服資訊系統，應儘速建置並力求符合公司長期發展之需要，值此固網業者摩拳擦掌即將投入市場之際，更是顯得刻不容緩。衡量各種主客觀條件，為求縮短系統上線時間，本公司發展CRM Based 專戶客服資訊系統之功能建置階段，可先從Self Service 及Lead generation 等部份著手，提供客戶貼心的服務，首重客戶服務及行銷之自助化、自動化功能，以應付短期內亟思以有限人力強化企業客戶服務效能之努力。其他如具In-Bound/Out-Bound功能之Call Center及各式客戶行為及市場行銷分析功能均應逐漸齊備。

由於建構CRM系統之相關技術發展方興未艾，各種更吻合現代企業發展e-Business及與客戶建立一對一行銷環境之資訊應用工具推陳出新，而企業發展客戶CRM等類似系統常需耗費不貲不能時而為之，故規劃中之CRM Based 專戶客服資訊系統應力求引用較新之技術觀念，並提供中文化應用之環境，切毋為求一時之便或囿於現有經驗，而發展出過時的系統，無法勝出於競爭對手又升級困難，反成企業進步之另一絆腳石。

伍、附錄

CRM Solution

The MetaEdge Professional Services organization is uniquely qualified to provide complete end-to-end solutions in Data Warehousing, ebusiness, CRM, and customer intelligence. We have considerable experience across vertical industries, horizontal applications, and infrastructure (e.g., Oracle, DB2 and NT SQL databases, OLAP, etc.).

The MetaEdge Professional Services team uses our proven, full systems, development life cycle, methodology, our products, and best of breed vendor products in order to assist your information technology team to deliver and deploy world-class solutions in record time.

Our individual consultants have superior education and real-world major engagement experience, and strong management and software development teams support them.

The MetaEdge Professional Services team consists of a full range of senior Architects (Systems, Data Warehouse, and applications), Data and Metadata experts, Project Managers, and DBA consultants. Our seasoned experts at MetaEdge are able to provide value-added consulting.

We have provided services to many Fortune 500 companies for Data Warehousing, Very Large Database (VLDB), CRM, eCRM, ebusiness and ecommerce, business analytics, customer intelligence applications, and web integration.

We understand that each company has its own business requirements. We analyze each company's needs and recommend solutions that include standard features, customizations, and extensions where necessary.

Technology Overview

C-INSIGHT: The MetaEdge Solution

Maintaining one-to-one relationships with customers is the leading factor that separates successfule-businesses from e-business failures. With its C-Insight software solution, MetaEdge will quickly put you, the e-businesses, in a position to get to know your customers. You will be equipped with the customer insight you need to make critical business decisions that maximize the lifetime value of your customers.

The MetaEdge
C-Insight Solution
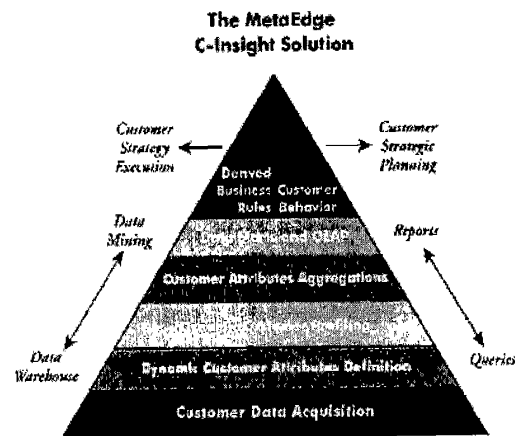
C-Insight represents a new generation ofe-customer profiling tools that enables a company to gain a customer-centric viewof its business (see features below).C-Insight 's distributed object architecturepromotes the integration of both front-andback-end third party business applications.Running on top of adynamiccustomer-intelligence engine,C-Insight enables correlation betweencustomer intelligence and businessoperational performance.

C-INSIGHT Features

C-Insight, MetaEdge's customer intelligence solution,
integrates different sources of customer data, and
provides powerful and efficient data analysis
capabilities which include:
Dynamic customer attributes based on events,activities, and transactions.
Dynamic customer segmentation. Customer valuation and scoring. Customer

migration rates. Dynamic OLAP reports based on dynamicallycreated customer profiles. Customer Retention. Business Rule-induction.

C-Insight is an end-to-end solution that enablesclosed-loop decision support.

ENABLING SEAMLESS INTEGRATION

Our object-oriented architecture provides easyintegration with front-end customer interaction and management applications such as, e-commerce,sales force automation, marketing automation, CRM,customer service, call center, and more. Its seamless integration with data marts, OLAP, and other reporting tools provides the capability to generate an active view of any business operation.Our tools are based on dynamically created customer profiles and include a rich set of data mining procedures.

Product feature

Customer Intelligence Platform Dynamically Extensible Customer Information Store GUI Design Studio for Customer-Centric DataWarehouse Integrated Customer Data Consolidation and Movement Automatic Customer Database Construction GUI and Wizard-based Configuration Management for Customer Intelligence Modeling and Analytical Functions Distributed Object Oriented Architecture and Interfaces to E-commerce and other Customer Management Applications Customer Activity/Event Correlation Time Sequence Analysis for Customer Activitiesand Events Cross Business Function for Customer Life Cycle Analysis Online Customer Segmentation Framework Dynamic Customer Profiles Creation and Update for Segmentation Schedule and Task Management for Pre-Calculation of Customer Segmentation Customer Segmentation Caching Capability for High Performance and Fast Analysis Customer Profiling Metadata Repository for Business Rule Management Multiple Customer Intelligence Analysis Models Customer Scoring Model
   - Retention, Attrition and Migration Rate Analysis
   - Profitability Gain Table
   - Buying Propensity
   - Customer-Centric Balance Score Card
   - Dynamic Customer Profiling Model
   - Recency, Frequency, Monetary (RFM) Model
   - Retention, Attrition, Migration Rate Analysis
   - Demographic, Geographic, Psychographic, Responsegraphic Analysis
   - Customer Life Time Value (LTV) Analysis Customer Profitability Analysis

Time Sequence Correlation model Customer Behavioral Association Model
- Market Basket Analysis
- Customer Profiles
- Product Purchasing Association Rich Set of Pre-built Quantitative
    Analytical Functions Conventional Techniques
- Percentile
- Cumulative
- Ranking
- Range Brackets Statistical Techniques
- Histograms
- Sampling
- Pareto Data Mining Techniques
- Decision Tree
- Affinity Rules
- Classification and Clustering
- Sequence Pattern Analysis
- Fuzzy Logic (Future)
- Genetic Algorithms (Future)
- Neural Network (Future) Time Series Moving Average (Future) Dynamic
    Customer-Centric Data Mart Builder Customer-Centric Data Mart
    Designer Dynamic Generation of Customer

Data Cubes:
Cubes with Customer Dimension or Customer Profile Dimensions
Cubes Pertaining to Certain Customer Segment
Dynamic Customer-Centric Data Mart Builder
Customer-Centric Data Mart Designer
Dynamic Generation of Customer Data Cubes:
Cubes with Customer Dimension or Customer Profile
Dimensions
Cubes Pertaining to Certain Customer Segment

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Our team operates with a passion and an attention to critical success factors:
Complete Solutions that exceed customer expectations
Delivering Outstanding Value
Understanding client needs
Producing high quality results
Matching resource expertise to client requirements
Proven Methodology and use of Best Practices

M ɪ ɪ ʌ ɛ ᴅ ɢ ɛ

(eRM)

Ian P. Cavanagh
V.P. Business Development
Kana Communications

Presentation to

Chunghwa Telecom
&
MetaEdge

December 5th, 2000

Kana Communications, Inc. (NASDAQ:

History
- Founded in 1996 - Online Communications
- Fortune: Among Fastest Growing Software Companies
- Q300 Revenue $40M, 975%+ Growth

Industry Leadership
- Leader in Internet and Global 2000 eRM
- Broadest Range of Communications and Relationship Management Software
- Over 850 e-business Customers

World-Class Team
- Over 1200 employees and 350 engineers
- Strong Partnerships with Industry Leading Systems Integrators incl. Andersen Consulting
- World-class services and ASP Hosting
- Worldwide offices in NA, EMEA, Asia & Australia

Kana Success Metrics

	Q1 1999	**Q3 2000**
Market	E-Mail	Platform/Applications
Customers	90% Dot.com	90% Global 2000
# of Customers	35	850
ASP	$45K	$700K/$200K
International	0	25%
Top Customers	No Name Dot.coms	G.E. Capital
		PSiNet
		Cisco
		Bell South
		Washington Mutual

Key Success Metrics

	Q1 1999	**Q3 2000**	**Growth**
Employees	50	1,200	(24x)
Engineers	13	375	(28x)
Quota – Carrying Sales Reps	6	120	(20x)
Revenue Sources/Products	1	11	(11x)
Partners	9	150	(16x)
Partners Touched Revenue	2%	30%	(15x)
Revenue	$1.3m	$40.5m	(31x)

Product Overview

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eRM: Communication is Key

Marketing

Communications

Customer
Service

Sales

Internal-----Partner-----External
(Employee)   **(Customer)**
(Source: Yankee Group – June 2000)
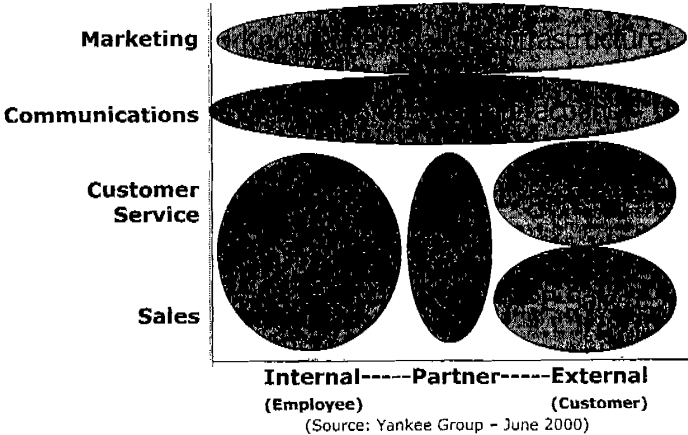
**Kana is the Leading Provider of Enterprise
Communications and Relationship Management Solutions**
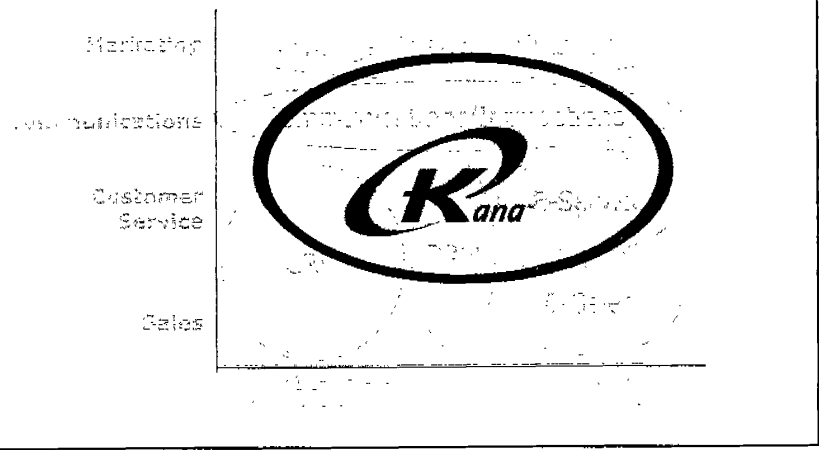
Building Lasting Enterprise

- **Global view for Relationships
  partners and the enterprise**

- **Multiple communication channels**

- **Broad range of interaction
  methods**
  - Assisted, Virtually Assisted, Self Service &
    Proactive

- **Integrated set of e-business
  applications**

Kana's eBusiness Products

Customer Portal	Partner Portal	Enterprise Portal

E-mail	Phone	Web	Chat	VoIP	Wireless
Kana Connect	Kana Response	Kana Advisor	Kana I-Mail	Kana Chat	Kana Voice

Kana Service	Kana Sales	Kana Marketing

Kana E -Business Platform	Kana Studio	Kana Conduits
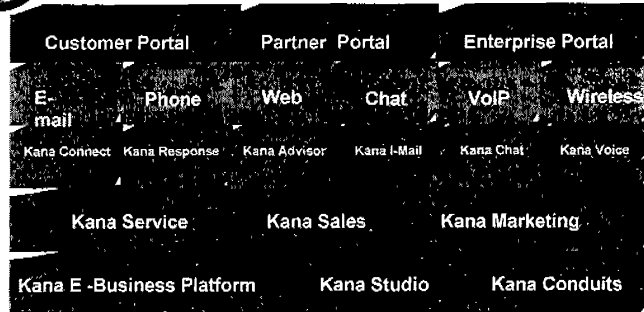
2001/3/30   Hitachi Data Systems   75

The Kana Difference – Platform

- Modify workflow and business rules in realtime
- Rapid, modular deployment
- Web-native architecture scales to millions of interactions daily
- Extranet workflow incorporates partners seamlessly
- Deliver customized views for groups of employees, partners and customers and deploy via

Kana Response
High-Performance E-mail Customer Service
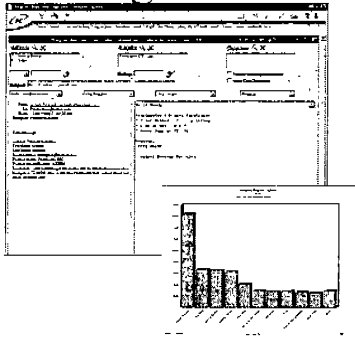
Respond quickly and consistently to high volumes of e-mail inquiries
- Prioritize important messages
- Reduce message handling time
- Route questions to appropriate agents and suggest correct responses
- Collaborate with staff outside of Kana system
- Report on volume, productivity, service levels and inquiry topics

Kana Connect
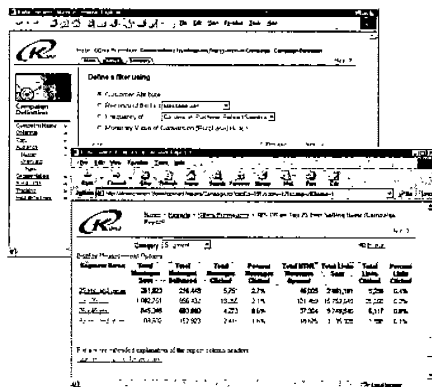
- Engage in permission-based marketing
- Leverage EDM techniques like RFM modeling and trialing
- Analyze response rates, attrition, and ROI
- Build customer profiles
- Deliver high volumes of dynamic content
- Automate event-driven

Kana Advisor
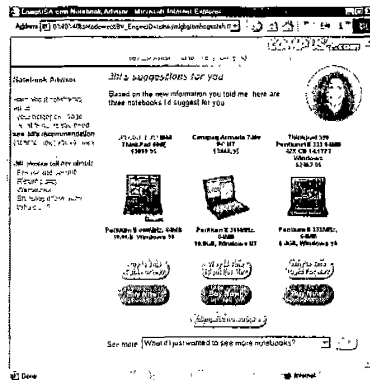
- Build trust with each customer
- Mimic your best sales agents
- Show customers the best fit
- Leverage preferences and psychographics
- Tailor the buying experience
- Qualify prospects for assisted service

Kana I-Mail
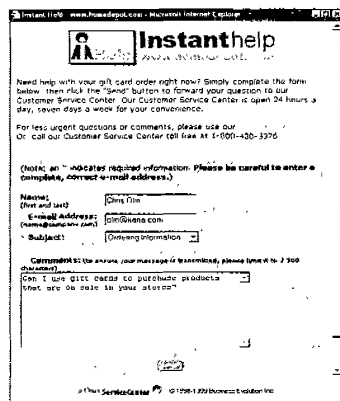
- Realtime assisted service
- Reduce shopping cart abandonment
- Web based, structured question and answers
- Collaborate by pushing pages and content
- Offer different service levels based on context or profile
- Selectively route to e-

Kana Phone
CTI Integration
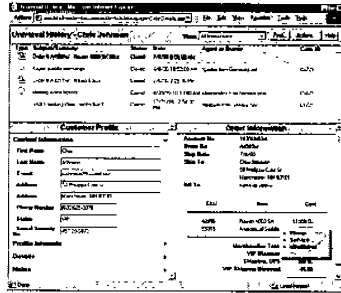
- Integrate with CTI systems
- Pop screens to initiate new cases
- Leverage IVR data to display customer profile to agent
- Show universal customer history across contact channels
- Include order history and status
- Phone agent can close open e-mails related to same case

Kana Service
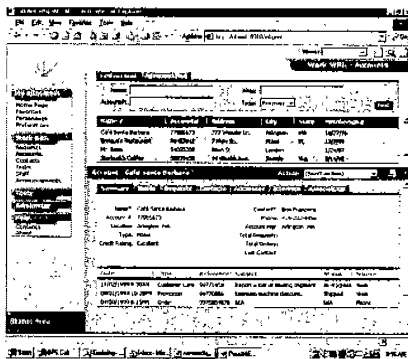
- User interface for managing requests and cases
- Set of service templates
- Include partners in workflow
- Ability to provide customer and

Customer Examples

Kana Response at eBay

- 250,000+ eMails / Week and Growing
- Accommodates Remote CSRs
- Reliable, Scaleable System Handles Peaks without Interruption
- Essential Tool for Management Decisions
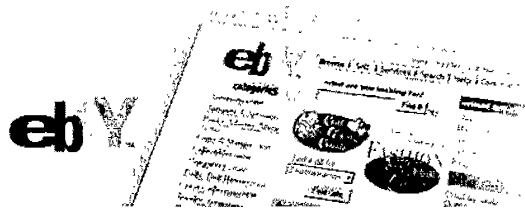
Kana eBusiness and Response

Priceline.com

"The combination of Kana Response and the Kana eBusiness platform helped priceline.com maintain a superior level of customer service as the breadth of priceline.com's product offerings grew and as our service expanded internationally."

- Case management and integrated email
- 5K e-mails per day on 4 core products
- SLA of 80% in 3 hours, 100% in 6 hours
- 24/7/365 support
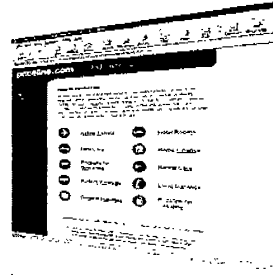
Kana Classify at AT&T

"We absorbed our growth in e-mail volume within the efficiencies of Kana Classify"

Greg McMichael, Manager, Planning & Strategy, Customer Care

- tens of thousands of e-mail inquiries per month
- Kana Classify currently auto-responds to 20% of inquiries
- Auto-suggest enables e-mail turnaround in 2.5 minutes on average
- Agents handle 60K e̶-̶ ... acity to spare
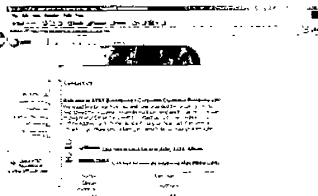
Kana Service at E*TRADE

- Complete Integrated eAgent Portal
- Integration to legacy Account, Trading, Quote and News Systems
- Complete Case Management
- Planned for 2,000 users

Open an
E*TRADE
Account

Get S&P Stock Reports online for
FREE — a $120 annual value!

Kana Connect at Williams-Sonoma

**"...great complement to increase store traffic and enhance catalog sales..."**

WILLIAMS-SONOMA

- Targeted E-mail Promotions
- Collected e-mail addresses in retail stores and asked permission to send offers
- Sent discounts for in-store purchases at new outlet stores
- Personalized content with address of closest store
- 7% and 11% response rates
- 2X → 10X typical direct marketing conversion rates
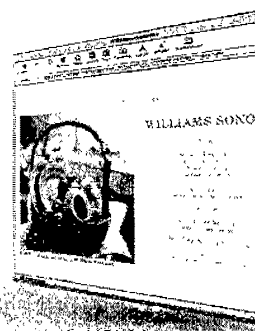
Kana I-Mail at Home Depot

- Deployed in less than 30 days
- Selective response times to customer queries based on price tag of online building projects
- Immediate responses for high value prospects
- Responds Back to Web Site or e-mail address
- Tiered Service Level Capability
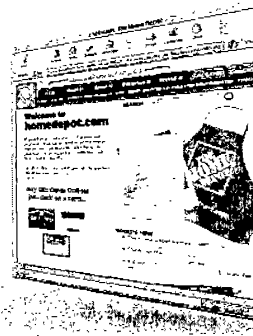
Kana Service at CISCO

"Now by adding the application functionality of the Kana Service system to Cisco's own communications management solutions, we will be able to enrich our customer and partner interactions. This enables us to use all communications channels to have a positive effect on customer service and develop superior customer retention."

Pete Solvik, senior vice president and CIO, for Cisco Systems, Inc

- Next generation eContact center
- Personalized experience
- Integrate partners and resellers
- Phone, email, web integration
- Case management

CISCO SYSTEMS

CLARIFY eBUSINESS APPLICATIONS
Wh i te Pa p e r by C l a r i fy e Bu s i n ess A p p l i c a t i o n s
CRM Overview
Executive Overview
Organizations worldwide are undergoing fundamental shifts in how they operate and interact with customers and prospects. During the mid-1980s and the early 1990s, many organizations began re-structuring and re-engineering their business processes to cut costs and become more efficient and competitive. However, these organizations realized that building the necessary technology to achieve these goals was expensive, difficult, and time consuming. As a result, many companies turned to enterprise resource planning (ERP) applications. ERP applications helped them automate and optimize their internal business processes in areas such as finance, manufacturing, inventory management, and human resources. At the same time, they freed them from some of the tactical, day-to-day operations of running a business.
Today, the focus has changed, due to the rapidly growing numbers of individual and business customers that demand increased attention and immediate service (i.e., "Internet time").This new focus on the customer is being fueled by two trends: the rising cost of sales and a decline in customer retention rates. Companies are adjusting their business practices accordingly, and many of them are looking at customer relationship management (CRM) software as a promising solution.

Clarify eBusiness Applications
WHAT IS CRM?
CRM solutions focus on automating and improving processes in customer-facing areas such as sales, marketing, customer service, call center and support. CRM goes several steps further than ERP in that it helps organizations maximize their customer-centric resources (people and assets) and focus them on their customers and prospects. CRM aims to improve organizational effectiveness by reducing sales cycles and selling costs, identifying new markets and channels for expansion, and improving customer value, satisfaction, profitability, and retention.
Today businesses require a single, integrated and centralized system of customer data that can be leveraged easily to analyze customer trends, needs and loyalty to reduce sales costs, increase customer retention rates and increase employee productivity and effectiveness and this is accomplished through a CRM solution.
CRM takes a very customer-centric view of the entire customer life cycle, which means that CRM applications place the customer at the center of the organization's universe. These solutions facilitate the coordination of multiple business functions (sales, marketing, service, and support) and focus them on total customer satisfaction. CRM applications also help achieve this by integrating and coordinating data from multiple channels of interaction, such as face-to-face, call centers, and Web sites.
CRM solutions are not intended to replace ERP systems. On the contrary, a CRM solution is a key component of a total enterprise solution, which also includes back office systems. Integrating a company's CRM and ERP components provides a link between its two most strategic information systems.This link lets the company deliver a consistent view of customer information across the enterprise. and provides customers with a consistent experience of the company.

WHY IMPLEMENT A CRM SOLUTION?

- To increase the effectiveness of employees who interact with customers or prospects.
- To improve customer responsiveness and a to create more comprehensive view of the entire customer life cycle.
- To increase revenue and productivity
- To retain customers and build loyalty by improving customer service
- To decrease costs

BENEFITS OF CRM

n **Customer loyalty**—In order to retain customers over the long term, businesses must invest in those customers over time. A CRM solution provides a unique opportunity for organizations to get to know each customer as an individual, and to develop products and services specifically targeted to their needs. Opportunities to develop existing customers include upselling new and add-on products and services, providing flexible service agreements, and developing new products and enhancements based on customer change requests.

n **Reduced Sales Costs and Increase Profitability**—With sales and marketing costs representing up to 60 percent of revenues for many businesses, companies are now focusing their efforts on reducing the cost of sales. In order to accomplish this, different internal organizations—including marketing, telemarketing, telesales and field sales—must work together to manage the sales process.

n **Proactive Management of Accounts**—Customer service solutions help companies proactively manage customer accounts and build long-term relationships These solutions help companies provide faster, more accurate answers to customer questions, and increase customer loyalty as a competitive advantage.

n **Improved Product Quality and Customer Responsiveness**—Quality assurance solutions close the loop on a company's customer relationship management processes by ensuring that customers' product and enhancement requests are handled in an efficient, accurate, and timely manner, and that the company's products consistently meet customer needs.

Clarify eBusiness Applications

Increased Customer Satisfaction—A CRM system moves companies towards a "one-to-one" relationship with their customers. With CRM, companies can proactively address customer needs—for example, by keeping track of when a larger-than-normal number of support requests are made in a short time frame, and contacting the customer to find a long-term solution to the short-term problem. Companies can also use CRM solutions to identify buying patterns, and then use the information to market directly to a customer's wants and needs.

Transition from Product Selling to Solution Selling—Many customers are requiring solutions from vendors, not just products. The key issue is that how to configure a comprehensive solution from a variety of products and services is often held within the minds of a few resources, making selling an appropriate solution a challenging task. With CRM software tools such as Product Configurators, employees or even customers can automatically configure the very simple to the most complex solution configurations, based upon a correct combination of products and services.
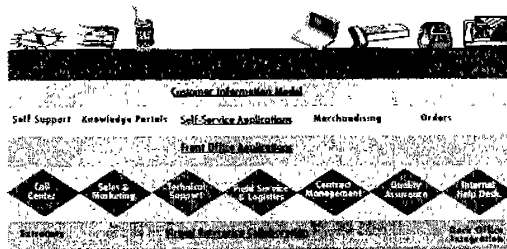
CRM's Components

CRM applications' functional components include sales applications (sales force automation, sales configuration, and Web-based, unassisted sales), marketing automation, and customer service and support applications. Channels include the Web, call centers and phone, and mobile devices.

Sales Force Application (SFA) –Description and Requirements

SFA automates the fundamental activities of sales professionals, both in the field and internally. Common applications include calendar and scheduling; contact and account management; compensation; opportunity and pipeline management; sales forecasting; proposal generation and management; pricing; territory assignment and management; and expense reporting.

A companion to SFA applications is a sales configuration application, which allows application users (either a customer or sales representative) to automatically and intelligently assemble product components into finished goods.

Clarify Solution

ClearSales provides a comprehensive system for automating the entire selling process— from qualifying leads, to developing opportunities, to closing deals. The new capabilities in ClearSales are designed to enhance sales representative productivity, automate enterprise-wide collaboration, encourage collaboration with channel partners, and ensure successful implementations.

48

Marketing Automation Applications –Description and Requirements
Marketing automation applications complement SFA applications and provide certain capabilities that are unique to marketing.These can include Web-based and traditional marketing campaign planning, execution, and analysis; list generation and management; budgeting and forecasting; collateral generation and marketing materials management; a "marketing encyclopedia," which is typically a repository of product, pricing, and competitive information; and lead tracking, distribution, and management. Marketing automation helps companies analyze customer purchasing histories and demographics, design targeted marketing campaigns, and measure results.

Clarify Solution
Clarify's Marketing solution offers superb campaign management and marketing analysis tools for a variety of communication mediums. Using MarketFirst in conjunction with Clarify, organizations can segment particular customer groups within Clarify or external sources, then plan, manage and execute targeted campaigns to them. Clarify's Marketing Encyclopedia, provided through Diffusion, electronically distributes and consolidates up-to-date marketing information into an easy-to-use, single source repository.

Customer Service and Support Applications –Description and Requirements
Customer service and support (CSS) has become critical for many organizations since customer retention and profitability depend in many cases on delivering superior service. CSS applications are typically deployed through call center environments or over the Web for self-service. They allow organizations to support the unique requirements of their customers with greater speed, accuracy, and efficiency.

CSS applications also help companies transition their customer service organizations from cost centers to profit centers. These applications, when fully integrated with sales and marketing applications, can provide unique opportunities for organizations to up-sell and cross-sell additional products into their customer base. The robust customer data found in modern-day CRM packages also enables up-selling and cross-selling through multiple channels, including the Web and call center.

Typical CSS applications include customer care; incident, defect, and order tracking; field service; problem and solution database; repair scheduling and dispatching; service agreements and contracts; and service request management.

Clarify's Solution
Clarify's ClearSupport is a fully integrated customer request and trouble management
solution. By providing a comprehensive view of both customer accounts and the
communications network, ClearSupport provides a single point of contact for customer
inquiries, service requests and problem reporting.
ClearSupport is designed for both internal and external support organizations. It allows
these organizations to manage all aspects of the call handling process by allowing support
representatives to:

• log cases
• set priorities
• route cases
• verify contracts
• review case histories and track case related costs
• record all activities related to a case and provide a full audit trail
• manage configurations and track case-related costs
• proactively manage customer relationships.

Clarify's customer service solution is a key component in the creation of personalized
selling strategies and programs. It provides:

• "Closed-loop" problem resolution, automating everything from taking the call,
   to providing the service, to fixing the problem.

• Maximum cross-selling or up-selling opportunities, made possible by leveraging
   all of the information about any given customer.

• Easy collaboration through every part of the organization, ensuring that customer
   needs are thoroughly met.

• Consistency of access, providing customers with the option of reaching the
   company by a variety of self-service vehicles, such as email and the Internet,
   and obtaining immediate results—24 hours a day, 7 days a week.

Call Center Solution –Description and Requirements
Today's call center organizations face a complex set of challenges for businesses. First, they need to know comprehensive information about each customer or caller *before* the call is connected, and they need to manage and track every type of customer interaction.
Agents in the call center are required to perform a much broader range of tasks than ever before, and to provide answers to a wider variety of inquiries and service requests. At the same time, call center managers need solutions that help them track and improve call center performance, while reducing costs, increasing productivity and increasing revenues and profitability.

Clarify's Solution
Clarify offers a call center solution with an innovative and invaluable difference. Computer Telephony Integration routes each customer call to the most appropriate agent for that particular customer, based on who they last talked to, what type of issue or problem is involved, and contact status. Before the agent ever says "hello," they know exactly why the customer is calling, and can efficiently and effectively address the issue at hand. Clarify's eFrontOffice routing engine also routes emails,Web chat requests, and Web "call me" requests, selecting available agents, and even using skill-based routing to find the best possible fit for each interaction request.

Business Intelligence and Analytical Capabilities –Description and Requirements
Although automating and improving customer-facing business processes is a major goal of CRM, it is also important that CRM solutions have robust business intelligence and analytical capabilities. CRM applications contain vast amounts of information that pertain to an organization's customers and prospects.This information needs to be leveraged and analyzed by decision makers so that they can make more informed and timely business decisions. An optimal business intelligence solution should work across CRM and ERP systems so that organizations can directly tie their profit-making activities to cost.

Clarify's Solution
Clarify's reporting functionality offers comprehensive out-of-the-box functionality, enhanced by add-on features from Actuate and Broadbase, as well as robust data mining. Accessible from third-party and native CSS applications, Clarify's reporting functionality saves customer time and resources from having to customize and recreate content for each report.

Support for Web-Based Functionality –Description and Requirements
The increasing use of the Web to support interactions and transactions inside and outside
the organization makes it critical that Web functionality be a key element of a CRM
solution.Web-based functionality is essential for applications such as Web self-service and
unassisted sales. Also, users of CRM applications—including customers and employees—
require ubiquitous access to these applications.This access should be provided via
standardWeb browsers, which typically require very little training and effort to use.
In this model,
business logic and data are maintained centrally, which facilitates the deployment,
main-tenance,and upgrade of applications.The cost savings associated with utilizing
Web- or Internet-based applications can also be significant.
Clarify's Solution
Clarify's eBusiness solutions—a core component of the Clarify eFrontOffice suite of CRM
solutions—are a family of software applications that enable personalized interactions
with customers and business partners over the Internet. Clarify's eBusiness solutions
provide companies with a highly scalable and extensible platform to expand their sales
and service channels to the Web, lower their cost of doing business, and provide a strategic
competitive edge based on high-quality, responsive service.

At a time when customers want personalized service that reflects their specific needs,
wants and preference, Clarify eBusiness Framework addresses this need.The solution
provides a personalized portal that integrates and consolidates all customer touch points
and provides a gateway to all Clarify eBusiness Framework applications.This highly
flexible model delivers a single, secure view and points of interaction that can be tailored
to customer requirements.
The Clarify Customer Portal is a personalized dashboard that serves as a gateway to offer
direct links to every application within the eBusiness Framework.This highly flexible
model delivers a single, secure view and points of interaction that can be tailored to
customer requirements.
Centralized Repository for Customer Information –Description
and Requirements
CRM solutions should work from a centralized repository that makes current customer
information available in real-time to all customer-facing employees. A centralized
repos-itory of customer information also provides data consistency across business
functions and functional applications.

Clarify's Solution
Clarify offers a tightly integrated module that gives companies a fast, flexible, 360-degree
view of customer data at several account-specific levels, including sites, contacts/contact
roles, service contracts, locations, and customer activity. Customer activity includes
support cases, sales opportunities, emails,Web chat sessions,Web browsing habits, etc.
With eFrontOffice, all customer touch points within the organization can be monitored
and tracked from a single location.
Integrated Workflow –Description and Requirements
Workflow refers to the automatic routing of documents and work items to the users
responsible for executing specific steps in a discrete business process. CRM solutions
should have a strong workflow engine to ensure that cross-functional tasks can be
accomplished as dynamically and seamlessly as possible.
Clarify's Solution
Clarify's strong ownership paradigm ensures that a customer inquiry or problem never
falls between the cracks. Important aspects of a project's structure, including escalation
capabilities, automatic assignment creation, and the ability to create and manage
admin-istrative groups, are also fully supported.

Integration with ERP Applications –Description and Requirements
As earlier noted, CRM applications cannot live in a vacuum.They need to integrate
seamlessly with ERP applications such as finance, manufacturing, inventory, distribution,
logistics, and human resources to be truly effective (i.e., provide a closed-loop
customer-interaction cycle). Integration must include low-level data synchronization,
as well as business process integration, so that the integrity of business rules can be
maintained across systems and workflow tasks can pass between the systems. A CRM-to-
ERP integration also ensures that organizations can perform business intelligence
across systems.
Clarify's Solution
Clarify has done many ERP implementations and integrations, and its professional
services staff is well versed in all popular back office solutions.To date, Clarify has also
completed hundreds of successful CRM implementations. Clarify also works with many
EAI vendors who have written various API's for Clarify.

Sales Configurator –Description and Requirements

A Sales Configurator broadens the functionality of a CRM solution by providing a foolproof order capture system that saves time and delivers error-free orders. It can be utilized across a variety of customer touch points, including Web self-sales, telesales, and mobile team selling. A Sales Configurator works in several ways. In self-service/self-sales applications, it walks customers through the process of ordering complex, custom-assembled
products, such as computers and cars. Its functionality is even more important for business-to-business transactions. For example, a Sales Configurator enables retailers that brand refrigerators or stoves made by others to specify the features they want, easily and accurately.

Clarify's Solution

ClearSales Configurator is a complete interactive selling system (ISS) built around a feature-based configuration engine that was designed to adeptly manage complex products, services, and pricing.The package includes a separate software development toolkit— ClearSales Configurator Workshop—that stores, manages, and updates all information about a company's product lines, pricing data, and business rules.

CRM for e-Business –Description and Requirements

The newest wave of CRM system functionality is the ability to promote and enable e-business, which is defined as any Internet-enabled business activity that transforms internal and external relationships to create value and exploit market opportunities driven by the new rules of the connected economy.

e-business includes Web-interactive components and their Web-enabled reconstruction (e.g., extranets,Web-enabled supply chains and collaborative commerce). It also involves technologies and applications that enable and manage Internet/Web transactions within the enterprise, as well as with its customers, suppliers, community, or industry. Examples of e-business products are sell-side applications for shopping carts, catalogs, configuration, personalization and payment.

For companies with more traditional channels of interaction, such as a direct sales force or telebusiness, CRM can extend these channels to the Web by providing a framework for managing the interactions and transactions online. CRM can also enable customers to purchase products or services online and receive Web-based service and support that is personalized for the individual customer.

Some enterprises have already implemented e-business initiatives successfully and have achieved significant results, such as:

•increased revenues
•reduced cycle times
•improved cash flow
•reduced inventories
•decreased administrative costs
•new marketing and distribution channels

Clarify's Solution
The heart of Clarify's CRM offering is its eFrontOffice application, which enables companies to extend their businesses to the Web. Clarify's integrated e-Business applications include:
n Clarify eConfigurator: Clarify eConfigurator, based on products and technology that the company acquired from Newtonian Software in 1999, enables e-commerce sites to sell complex products and services over the Internet.
n Clarify eOrder: Clarify eOrder redefines the standard for a fully functional electronic commerce solution. Clarify eOrder provides customers with the ability to browse multimedia catalogs, configure customized solutions, and order products and services over the Web. eOrder is part of a complete solution that enables organizations to more efficiently and effectively sell, service and consistently dazzle their customers as they expand their sales channel presence to the Internet.

• Clarify eMerchandising: Clarify eMerchandising provides online marketing, merchandising and information management for the Clarify Customer Portal. With Clarify eMerchandising, marketing organizations can design, develop, and deploy personalized product campaigns and promotions based on user profiles or behavior.
• Clarify eBusiness Framework: The Clarify eBusiness Framework is the backbone of customer-facing eBusiness applications.The eBusiness Framework consists of the Clarify Business Objects (CBO) infrastructure and the Routing Engine.
• Clarify eSupport: Clarify's eSupport provides robust self-service capabilities; for example, customers are empowered to solve their own service issues as well as interact and collaborate with customer service representatives. Using Clarify eSupport, customers can easily diagnose problems, view solutions, create new service requests, enter service details, and track the progress of open service requests.
• Clarify eResponse Manager: Clarify eResponse Manager provides customer service and sales organizations an efficient and effective way to provide fast, accurate, personalized responses to customer inquiries via email. Clarify eResponse Manager is fully integrated into the entire suite of Clarify applications, so email and Web form inquiries are now promoted to the same level of importance and service as phone inquiries.

Wireless eBusiness Solutions –Description and Requirements
The Gartner Group states that in 1999, vendors worldwide shipped more mobile phones than cars and PCs combined. By year-end 2003, more than one billion mobile phones will be in use worldwide.This explosive growth in the deployment of wireless technologies is expected to accelerate the trend toward e-business.
Wireless technology will have the most immediate impact on the mobile workforce, such as field technicians, support personnel, and sales people who interact on a daily basis with their customers. Wireless technology will make the mobile workforce more efficient, more productive, and more responsive to their customers. It will also provide corporate management with real-time visibility into every customer and partner interaction.

Clarify's Solution
Clarify's Wireless eBusiness Solutions is being jointly developed with Andersen Consulting.
The first Clarify Wireless eBusiness Solution will support enterprise service operations, followed by wireless applications for salesforce automation, remote service, and order-to-delivery. Clarify's Wireless solutions will be delivered over a wide range of devices, including Wireless Application Protocol (WAP) telephones,Windows CE and Palm OS handheld devices, and other wireless technologies.

Clarify's wireless field service solution is directed at companies that need to dispatch their field engineers quickly, without bringing them back to the main office. Clarify's wireless solutions also helps companies who need to change technician schedules frequently by giving call center agents real-time access to field engineers.With Clarify's wireless solution, there is no time is lost when a customer reschedules or when a customer visit must be immediately dispatched.
Clarify's Wireless eBusiness Solution benefits include:

• Shorter response time
• On-the-spot fulfillment of customer service requests
• Less rework and fewer delays
• Early access to customer and service request information anywhere, anytime
• Quick communication with field engineers
• Improved field engineer utilization and productivity

Clarify's eFrontOffice: An Integrated Approach
eFrontOffice, Clarify's front office solution, is the most complete suite of enterprise-scale,
Internet-ready CRM applications available today. It integrates information about every
customer interaction throughout an organization—including sales and marketing, technical
support, field service and logistics, quality assurance, call centers, and help desks.
Customer information, wherever it exists, is unified in a central database and shared across
organizational boundaries as well as the extended enterprise of suppliers and partners
who help meet customer needs.
Clarify eFrontOffice automates sales and marketing processes across all departments
and vehicles that have an impact on the process, including call center, field service,
and Internet e-commerce applications. It allows organizations to leverage of all information
acquired through these channels to proactively manage customer relationships, create
profitable cross-selling and up-selling opportunities, and maintains superior
customer service.
With business models changing as fast as technology, and competition at its peak,
organizations need a front office solution that provides the flexibility to adapt those
models across an evolving enterprise. Only Clarify's front office solution creates an
infrastructure that will grow and change with a business, even if that growth means
accommodating acquisitions, new partners, and new channels. Additionally, the company's
core technology can be integrated with virtually any platform or application.The
result is a single, seamless solution for managing customer relationships throughout
an extended enterprise.

The Clarify-Nortel Networks Merger: Natural Synergy
for Internet-Driven Solutions
The merger of Clarify and Nortel Networks brought together two top companies
betting their futures on the natural synergy they bring to the Internet sector. Both are
global companies with complementary profiles and a synergistic base of customers.
They share a common vision and a customer-driven culture.
Nortel Networks is the Internet market leader, creating a high-performance Internet that is
more reliable as well as faster, one that redefines the economics and quality of the Internet
and net-working. Clarify is the eBusiness market leader, developing customer-focused
eBusiness applications that combine all customer touch points across all customer-facing
organizations, as well as applications to extend sales and service channels to the Internet.
Together, they will create a new industry leader in eBusiness technologies, applications,
and services.
The new Clarify eBusiness Applications unit of Nortel Networks will deliver eBusiness
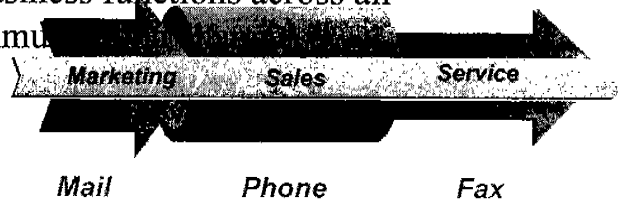solutions that leverage the Internet for profitable, loyal customer relationships.
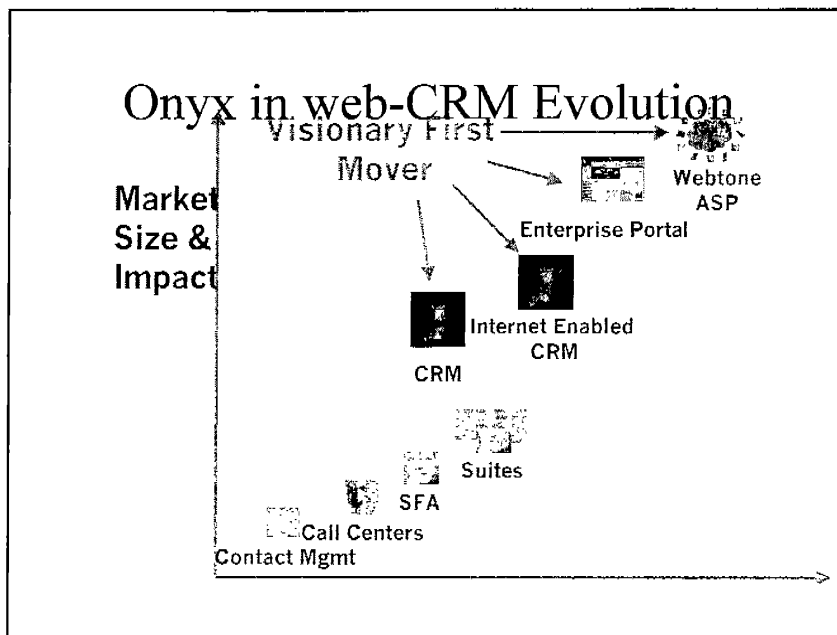
Onyx Software Overview

By
Howard Hawk
VP International Operations
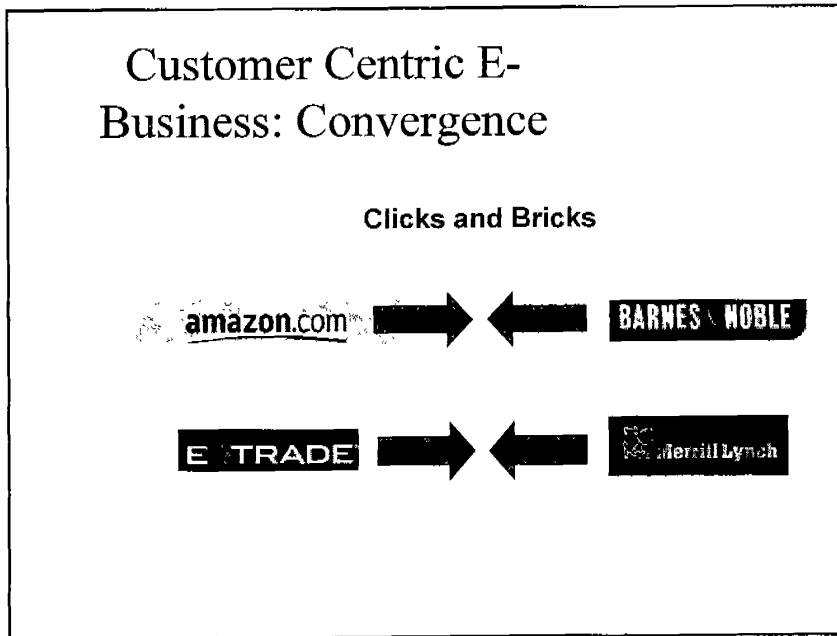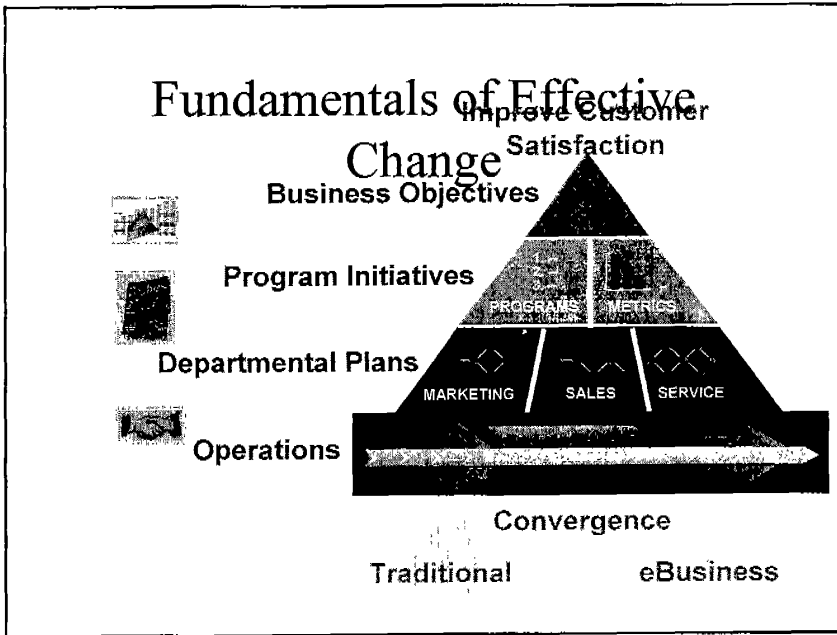
December, 2000

Onyx Software Goals

- Provide customers with a competitive advantage by automating and integrating their sales, marketing, customer service, and e-business functions across all commu...
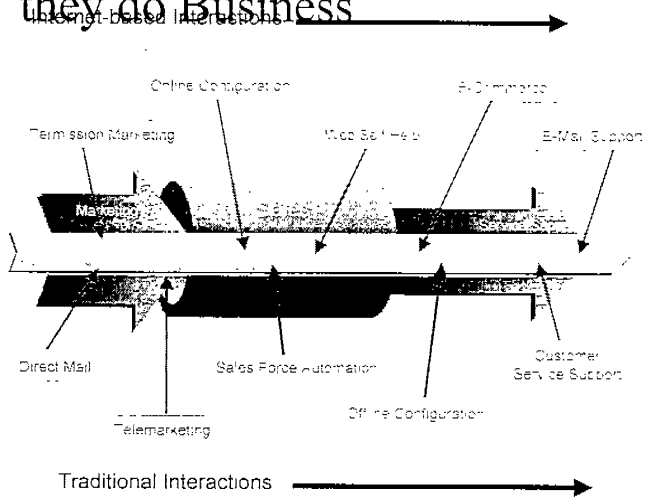
Onyx in web-CRM Evolution

Visionary First Mover ─────────→

Market Size & Impact

Webtone ASP

Enterprise Portal

Internet Enabled CRM

CRM

Suites

SFA

Call Centers

Contact Mgmt

Onyx is the leader in facilitating the
Convergence of Traditional Business and eBusiness

Fundamentals of Effective Change

Improve Customer Satisfaction

Business Objectives

Program Initiatives

Departmental Plans

Operations

MARKETING SALES SERVICE

PROGRAMS METRICS

Convergence

Traditional   eBusiness

Customer Centric E-Business: Convergence

Clicks and Bricks

amazon.com ➡️ ⬅️ BARNES \ NOBLE

E TRADE ➡️ ⬅️ Merrill Lynch

Customers Decide How they do Business

Traditional Interactions

Onyx - The Complete eBusiness Platform

IT Systems Landscape
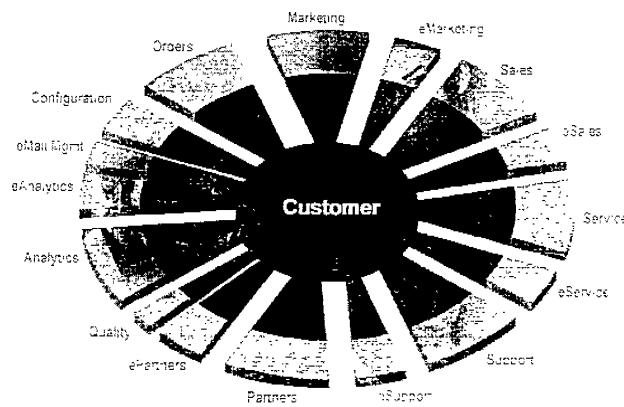
Back Office   Front Office   Business Intelligence
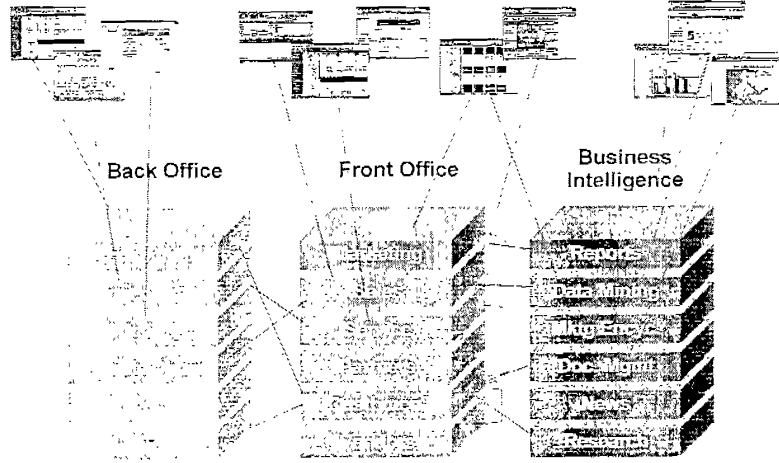
Customer-Centric IT Systems

| PC - Desktop | Web Portal | Wireless |

Back Office   Front Office   Business Intelligence

Marketing
Sales
Service
Partners
Customers
Vendors
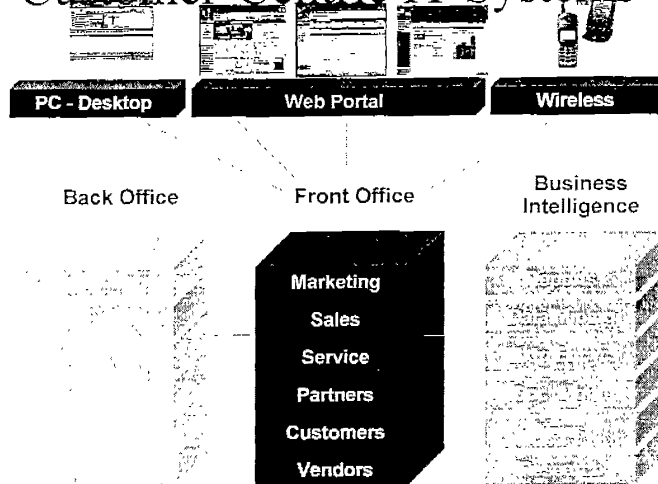
- Lead generation
- Customer profiling
- Literature fulfillment
- Campaign management
- Analysis and reporting
- Marketing encyclopedia
- Lead distribution
- Market intelligence
- One-to-One Marketing

- Channel management
- Presentations
- Opportunity management
- Account management
- Sales forecasting
- Quoting
- Product configuration
- Outlook integration
- **E-Commerce**

- Self-service/provision
- Assisted service
- Case tracking
- Knowledge base
- Profiling
- Problem resolution
- Collaboration

Onyx Front Office 2000

Customer Portal   **Partner Portal**
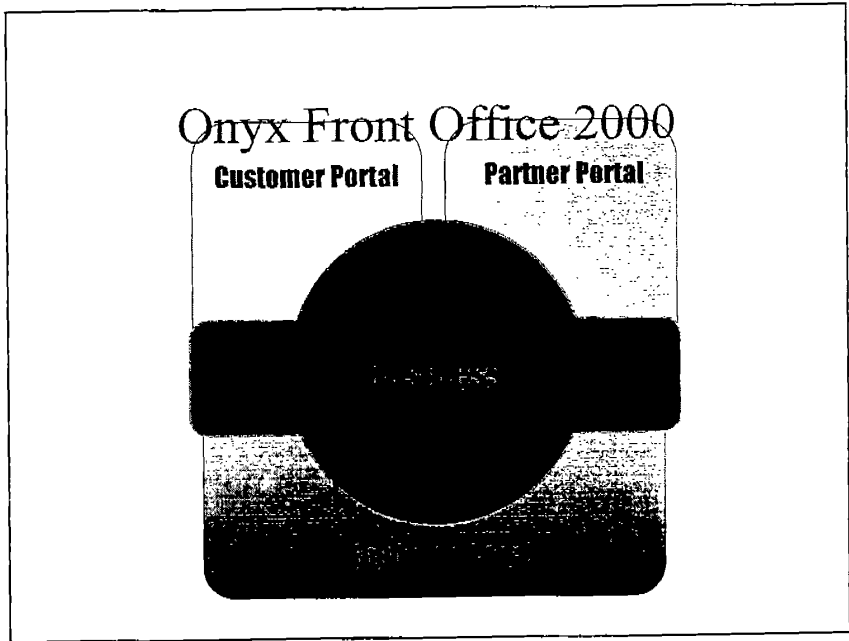
A Complete eBusiness Backbone

49% CAGR
(billions)

$2.3	$3.7	$5.4	$7.9	$11.5	$16.8
1998	1999	2000	2001	2002	2003

AMR Research, Sept 1999
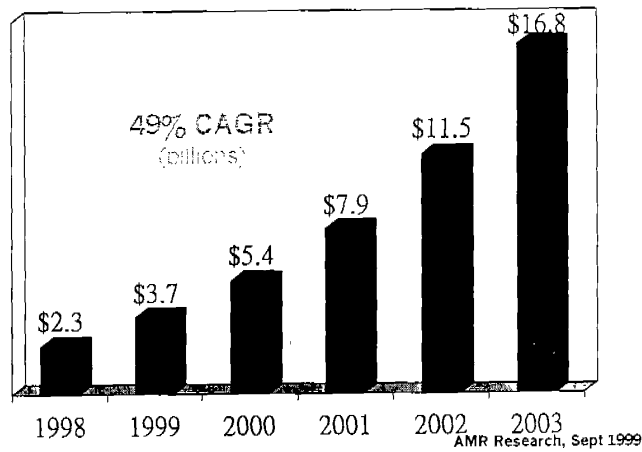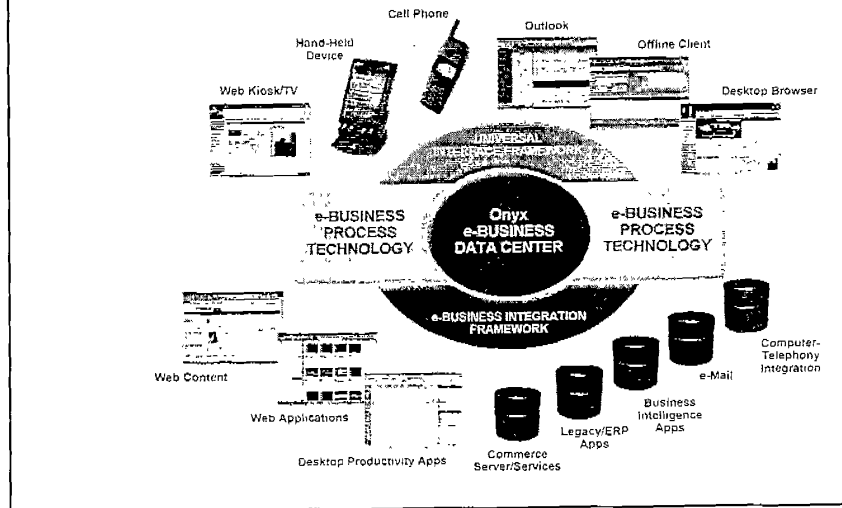
"Asia/Pacific, will realize the fastest growth in CRM of any region through 2004, at more than 30% CAGR; 2001 through 2004 will be the fastest growth years"   Gartner Group, 99

Onyx Overview

Who is Onyx?

Who is Onyx

- Leading provider of integrated CRM software

- 700+ customers

  - 90% using Onyx for integrated marketing, sales, and customer service

  - 75% using Onyx for CRM and eCRM

- 10th fastest growing tech company in the US $130M annual run rate (growing >100%)

- 750 employees

- Profitable

■ Revenues ($MM) ⌁ Operating Income ($MM)
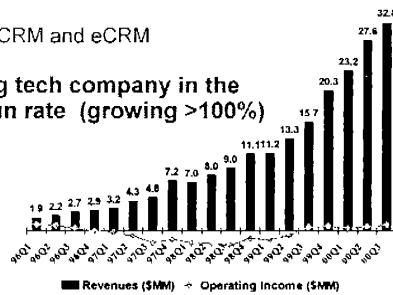
Onyx is the leader in

Enterprise-wide & Internet-based Usage

88% of Onyx Customers Use Onyx in 3+ Departments

75% of Onyx Customers Use Onyx for Internet Interactions

Seamless integration of sales, marketing, and customer service activities across electronic and traditional communication channels

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Financial Performance
➢ **Strong Financial Performance and Backing**

➢ **Strong Asia-Pacific Funding and Resouces**

➢ **Financial Commitment to full Japan Operations**

■ Revenues ($MM)
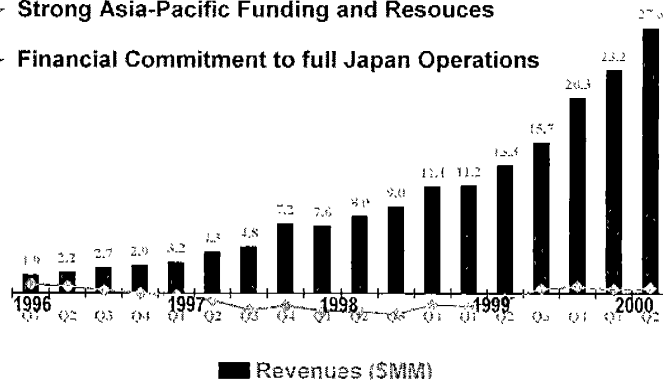
Award Winning Company

- 1998 SPA CODIE Award for "Best Enterprise Client-Server Application"

- Upside Magazine - 1998 Top 100 Private Companies

- Arthur Andersen 1999 Exceeding Customer Expectations Award & Industry-leading Customer Satisfaction Ratings in Multi-vendor Study

- Washington CEO Magazine - "Best Company to Work For 1999", 3rd year

- Deloitte&Touche's "Fastest Growing Technology

And most importantly...

Onyx is #1 in Customer Satisfaction
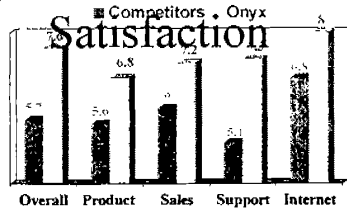
Highest customer satisfaction in the industry

Overall Product Sales Support Internet

Winner 1999 Best Practices Award for
Exceeding Customer Expectations

"Onyx continues to provide excellent customer service..."

"The white hats in a black-hat business"

International Presence
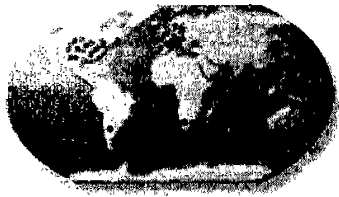
- Japan
- Hong Kong
- Singapore
- Malaysia
- Australia/New Zealand
- France
- Germany
- United Kingdom
- Netherlands
- Distribution worldwide **Spain, Italy, Scandinavia, S. Africa, Brazil Chile, Argentina, Mexico Taiwan**

Onyx in Asia-Pacific

Asia Pacific Market Presence
- #1 CRM vendor in Asia/South Pacific (Gartner)
- Direct Offices in Japan, Hon Kong, Singapore, Malaysia, Australia, New Zealand. 2001: Taiwan & Korea.
- 3+ yrs Direct investment
- 100+ strong team – (Double in 2001)

International Partnerships
- SI Partners in regional countries

    (Deloitte Consulting, Arthur Andersen, Compaq, PwC, Origin, WorldGroup)
- Pool of trained Consultants (200+, next yr 400+)

Direct Product Support
- Follow the Sun, 24 x 7 x 365 support

Amway

Creative Technologies

Ericsson

DBS Bank

BankDirect

EazyHealth.com

HorizonContactOne.com

International SOS

Inchcape

Singapore Telecom

Singapore Press Holdings

Hong Kong Trade Development Corporation

Starhub Internet (NTT and STT)

STT.com

Telstra

Teletech

Sung Hung Kai Properties

Sony Australia

Merial

Onyx Leading Customers

Telecom Leaders Choose Onyx

ERICSSON

n::

Telstra

Singapore Technologies Telemedia

CABLE & WIRELESS OPTUS

Broadwing

L3 communications

Telefonica

AT&T

EPHORMA

Across Industries Expertise

Telecom	Manufacturing & Distribution	Health Care	Government / Utilities
Cincinnati Bell	Dell	Sierra Health	DPWS – Australia
NTL Group	Bombardier	Penn State Giesinger	Corporation of London
Singapore Telecom	Colgate-Palmolive	Delta Dental of PA	New Mexico Economic
Cyberway Pte	Harley Davidson	F&G Life	Development Dept
AT&T	Fluke	Independence Blue Cross	Brooklyn Union Gas
Telefonica	Sharp	Northwest Permanente	Edison Source
Telcom Italia	Matsushita	Providence Health Plan	
Ericsson	Pitney Bowes		
Alcatel	Inchcape Motors	**Financial Services**	**Other**
Telstra	Iomega	American Express	Giga Information Group
Singapore Cable Vision		Credit Suisse	AMR
AT&T	**Software**	Development Bank of Singapore	Reed Excelsior
Telefonica	Cognos	Dreyfus	Seattle Seahawks
Terra	Allaire	Met Life Trust Co	Seattle Mariners
Optus Cable & Wireless	RealNetworks	Deutsche Bank	Le Cordon Bleu
Singapore Technologies Telemedia	Internet Security Systems	E*Trade U K. Ltd	
NTT	eSpire	Lloyds TSB	
		Barlays	

Financial Leaders Choose Onyx

DBSBANK

AMERICAN EXPRESS

CREDIT SUISSE

Fidelity **Investments**

E*TRADE

MetLife

SS&A

Bank9irect

First American TRUST

PRINCETON FINANCIAL

JANUS

AEGON

Where Time Is On Your Side
IDEX
MUTUAL FUNDS

SAFECO

UBS

Prudential

ASB BANK
Your future bank

Traditional Business Leaders Choose Onyx

COLGATE-PALMOLIVE COMPANY

3 SOLID SYSTEMS IMAGING

SONY

MAS

THE HAWORTH PRESS INC.

Westburne Inc.
REDEFINING DISTRIBUTION, EVERY DAY

PitneyBowes
Software Systems

community

CVS/pharmacy

Brooklyn Union
A KeySpan Energy Company

SHARP
FROM SHARP MINDS
COME SHARP PRODUCTS

Inchcape Motors

BOWFLEX

RESTEK
CORPORATION

Onyx Helps Customers Win

SIERRA HEALTH SERVICES, INC.

Sierra Health Services credits Onyx
with helping increase membership by
15%, reducing attrition by 40%, and
enabling $800,000 new net sales per rep

Inchcape Motors

Inchcape Motors, Jaguar, VW,
Subaru and Peugeot importer, used
Onyx to fuel 20% growth, and
improved dealer management

ASB BANK
Your future bank

BankDirect, New Zealand's first
phone- and Internet-based bank, relies
on Onyx to help them provide
impressive customer satisfaction levels.
While their competitors have
experienced decreasing customer
satisfaction, 95 percent of the more
than1,000 customers surveyed said
they would recommend BankDirect to
friends and family

**PRINCETON
FINANCIAL**

Princeton Financial Systems
was able to reduce client-to-rep
ratio from 10:1 to 15:1, rep
training time from 15 weeks to
6 weeks, and increase service
hours from 12/7 to 24/7

World Record Scalability for CRM

• "Onyx Software Announces Scalability World
Record for Customer Centric E-Business Software
on Microsoft Platform"

- 30,000 Concurrent users

- 4-Processor Server

- Windows 2000, SQL Server 7.0

- Real-world CRM & eBusiness Scenario
  - Sales Force Automation
  - Marketing Automation
  - Call Center / Support
  - eBusiness Transactions

Onyx Tier-1 Commitment

- To maintain the highest level of customer service
- A named account manager is designated to own the customer relationship by maintaining a proactive, regular, onsite presence. Responsibilities include:

  - Monitors on-going success and identifies the need for support / information

  - Communication for new product/service information

  - Business requirement change, and alignment with customer strategic goals

  - To escalate all critical support issues of Customer to Vice Presidents of Clients Services & Development, To provide high-level technical services.

Onyx Tier-1 Commitment

- Introduce Onyx Support Tools that deliver knowledge or support responses directly to Customer

  - Onyx Customer Portal

  - Onyx KnowledgeBase Systems (web-based Self-Help)

- Monitor on-going joint success rate and Customer Satisfaction via Arthur Andersen Customer Satisfaction Program

  - Utilize Onyx Survey / Customer Portal Capabilities

  - Adjust Onyx Service and Support offerings

Thank you

Onyx for ASP

◆Founding Member, ASP Consortium

◆Chair ASP Industry Education & Market Definition committee

◆Leader in Front Office outsourcing / ASP solutions

◆Launched ASPiN – 1999

   ◆Industry leading ASP Program

   ◆More than 30 Registered Partners

◆Partners:

   ◆Telstra

Why Choose Onyx?

- Onyx provides everything needed for seamless convergence of traditional and eBusiness processes
  - Integrated Enterprise-Wide Customer Management
  - Traditional CRM Capabilities
    - Lead Management, Lead Management, Campaign Management, List Management, Marketing Encyclopedia, Sales Process Automation, Forecasting, Pipeline Management, Service Automation, Support Automation, Product History, Quality Assurance

---

Onyx ASP Success - STT.Com

- First ASP web-based CRM Solution in Asia
  - "CRM on Demand"
  - Medium/Large Business Focus
  - Target Customers in 8 countries, including Singapore, Hong Kong, Malaysia, Philippines, Indonesia, China
  - Offers
    - eCommerce, CRM, Web design, hosting, etc.
  - Uses Onyx Customer and Employee Portal Architecture
  - Target 5,000 users by end of year
  - SI Partners: Arthur Andersen, Cap Gemini, SPL PriceWaterhouseCoopers, Netscape

Onyx ASP Success - Telstra

- NetTrader
  - ➤ Partnership between Telstra, Victoria State Government
  - ➤ SME Community aggregation
  - ➤ Portal Components:
    - ➤ Email, web-hosting, CRM, Tax reporting, Accounting..
  - ➤ Small / Medium Business Focus
  - ➤ Target 20,000 Customers in Australia

Onyx ASP Success - Interliant
- Onyx Front Office 2000
  - – Interliant started with Hosting background, backed by Softbank Venture
  - – Onyx System Integrator through acquisition of Sales Technology In U.K.
  - – Target Medium/Large, worldwide
  - – Offers full Onyx Front Office in Hosted and Managed environment
  - – Customers include:
    - FreeI.net (Peoplesoft)
    - Evoke
    - Photobition

THE BUSINESS OPPORTUNITY
Customer Relationship Management

Ketty Ombadykow
CRM Solutions
Director. Product Management

CRM Defined

Customer Relationship Management:

- A customer-centric <u>business strategy</u> enabled by existing and emerging technologies
- Allows customers and businesses to build <u>closer</u> relationships, with equal knowledge of each other
- <u>Aligns</u> enterprises around customer needs to enable consistent, high quality contacts
- Delivers <u>repeatable branded</u> service, increased customer <u>retention</u>, and

  top-line <u>business growth</u> through improved customer experience

Market Dynamics
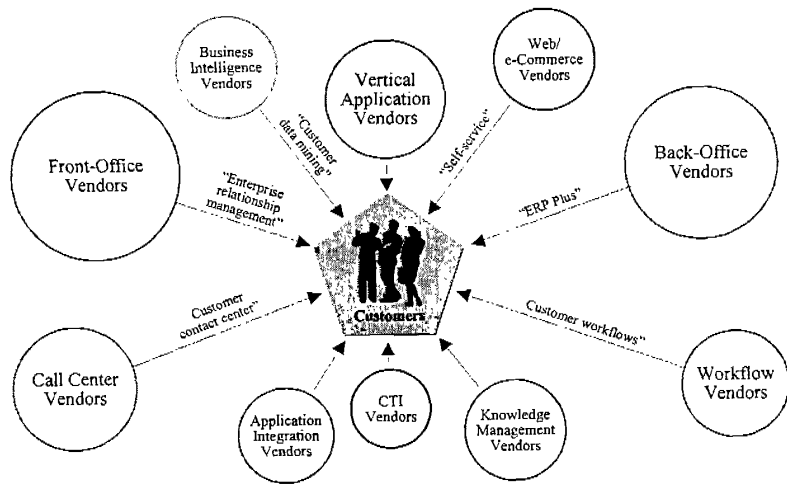
CRM Transcends Technology
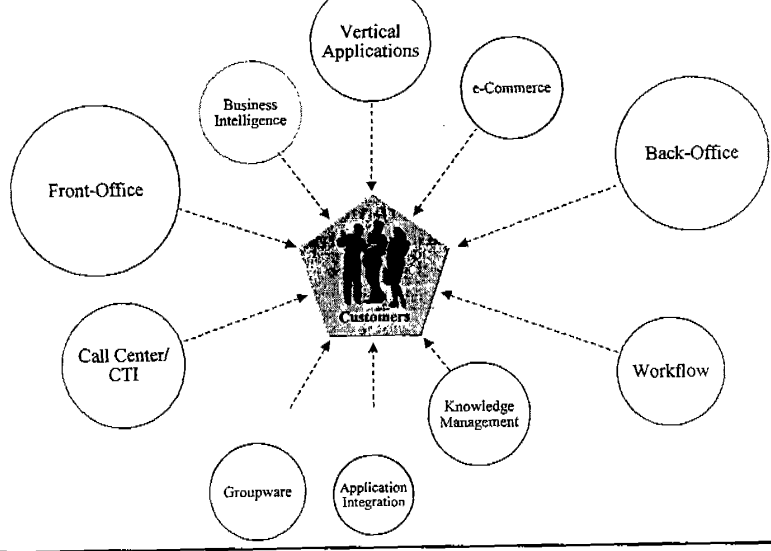
One Customer, One Enterprise

From: Customer Isolation
Impersonal relationship
Inconsistent customer view
Poor communication
No service differentiation

To Customer Intimacy:
One-to-one relationship
Unified customer view
Informed communication
Service-to-value
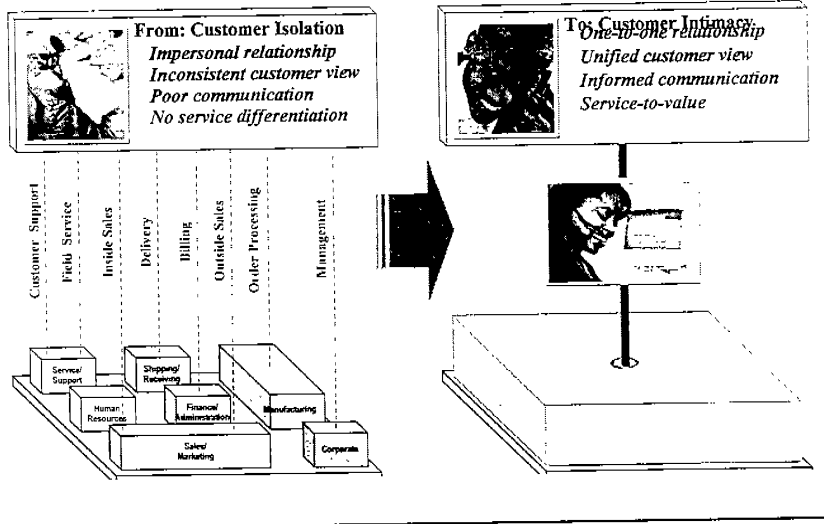
CRM: Ideal Customer Interaction

- **Customer sees only one enterprise**
- **Agent or knowledge worker is aware of total customer relationship**
- **Both share common information**

Our CRM Offer Portfolio View
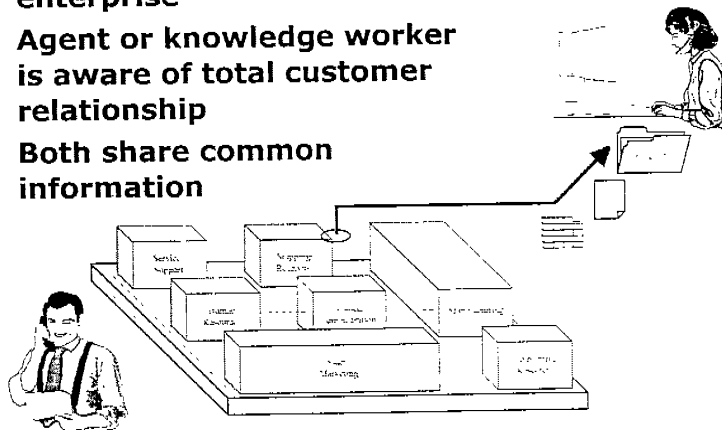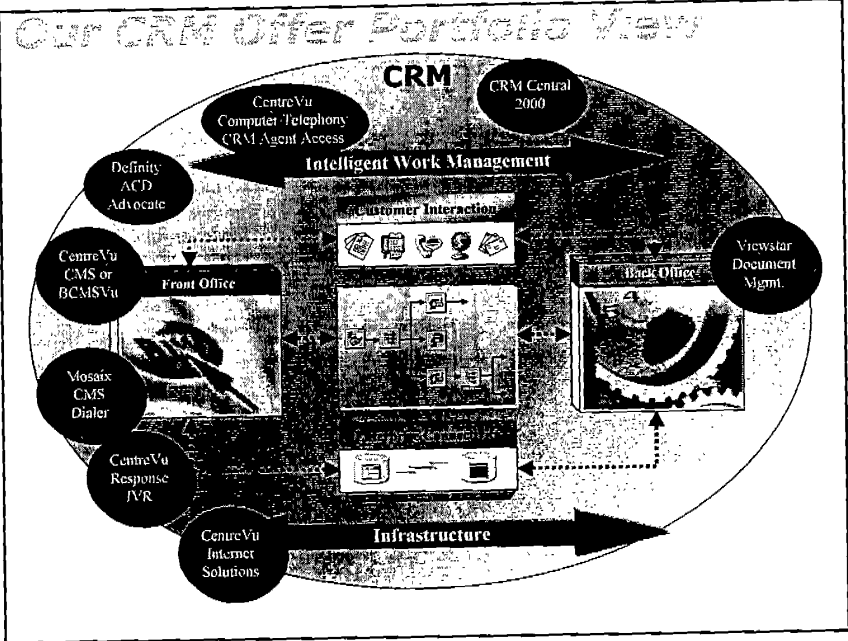
Agenda

- Today's Business Challenges
- The Business Opportunity
- Case Studies

CHANGE!

Your Business is Changing ...
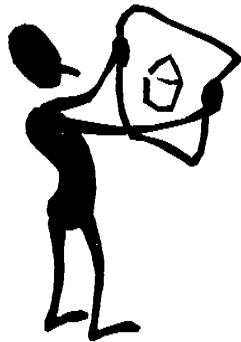
Today's Business Challenges

your enterprise

- changing economic environment
- industry re-structuring
- evolving technology
- product / service quality & development
- new competitors

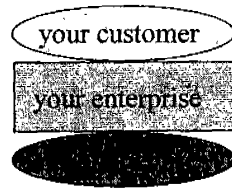# Your Customers are Changing...

Today's Business Challenges

•more choices
•more educated
•accessibility: time / media
•enhanced services
•more demands

your customer

Your Employees are Changing ...

Today's Business Challenges

your customer

your enterprise

- labor skills
- recruiting & training
- managing & keeping the best people
- demand for better tools
- employee empowerment

Change can be good ...

Change = Opportunity

improved efficiency

customer
retention

choices

your customer

investment protection

new services
for your customers
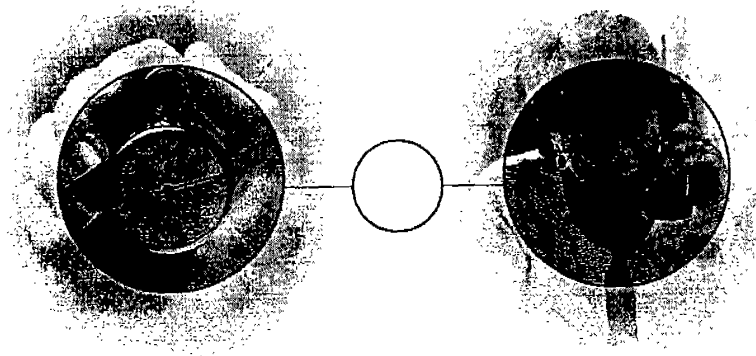
your enterprise

flexibility &
reliability

future vision

partnerships

...to address today's business challenges

The Business Opportunity

- Improve operational efficiency
- Improve employee productivity
- Improve customer service
- Optimize business opportunities

Improve Operational Efficiency

Improve Operational Efficiency

- Reduce talk time and network charges
- Make staff /agents more productive
- Route calls to the right place the first time
- Find out what's not working and fix it

Operational Cost Justification

- Seeks to minimize the cost per transaction
- Common focus for new centers, growing businesses
- Examples:
  - IVR applications to replace staff / agent transactions
  - CTI driven screen-pops, voice/data transfers
  - Consolidation of operations

Improve Employee Productivity

Select the Appropriate Resource

- Based on the skills of your staff
- Based on the location of your staff
- Based on the preference of your callers
- Based on the value of each caller to your organization
- Based on the time of day / day of week, etc.

"Best" Agent vs. Most Available Agent

- Foreign language preference
- Product / service knowledge
- Unresolved issue / open trouble ticket
- Geographic specialty
- Preferred agent assignment
- Relationships
- "Automated agent" (IVR) preference
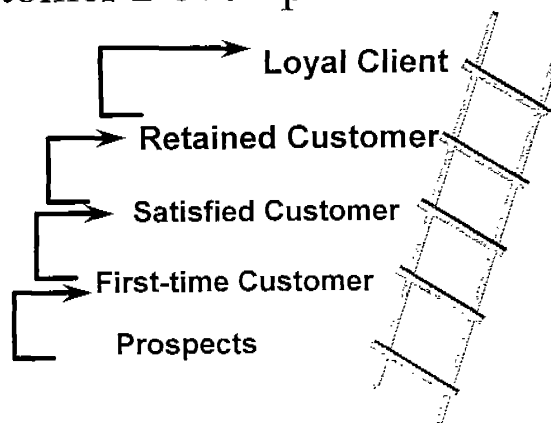- Agents at alternate sites

Improve Customer Service

- To retain most profitable customers
- To exceed customer expectations
- To differentiate from competitors
- To prepare for coming future changes

Customer Development Ladder

Loyal Client

Retained Customer

Satisfied Customer

First-time Customer

Prospects

Customer Service Improves
Customer Retention

- **It's more cost effective to retain customers than replace them**
  - *Keeping a satisfied customer costs one-fifth of what it costs to hire new customers*
- **The top 20% of your customers are likely producing 80% of your business**
  - *Loyal customers are less inclined to be price sensitive*
  - *Build on personal relationships; customize your products and services*

Customer Service Improves
Customer Retention

- **Learn to identify your top customers**
  - *The 20% who produce the most business have the secrets of why you are successful - ask them!*
- **Reward your loyal customers**
  - *Be innovative; look for cost-cutting ways to save (improved processes, co-marketing)*
- **Raise your customer service standards**
  - *Offer creative service options, innovative programs, priority treatment*

"Find out what your customers want - and then give it to them"

Customers For Life, Carl Sewell

Optimize Business Opportunities

- Understand the true value of each call
- Develop a strategy that clearly defines the purpose of the call center
  - Improved efficiency
  - Profits, new revenue
  - Increased customer value
- Utilize investments in technology
- Get to know your better customers better; encourage stronger relationships with customers, stimulating greater use of your companies products or services

Call Centers: A Strategic Tool

"call centers can and should be the 'switchboard' for the company's relationships with its customers, individually..."

*"call centers provide marketers a unique opportunity to interact with customers directly"*

"every inbound call represents a great opportunity..."

"a call center can help almost any company, with little respect for size or industry served, to effect dramatic improvements in its customer relationships, share-of-customer, and the incremental sale of products or services..."

Lucent Case Studies
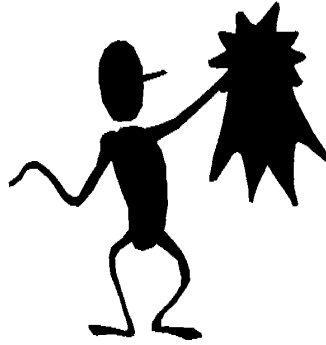
Case Study:
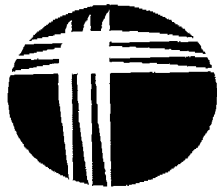
Hong Kong Telecom
Customer Front Office

"One-stop shopping" in Hong Kong...

Challenges

- 9 million calls per month!
  - 35,000 calls per hour during peak hours
  - 24-hour operations
- 30+ Call Center Sites / 2500+ operators (agents)
- 2000+ products and services
  - Multiple service hotlines
  - Multi-system integration required
- New competition emerging
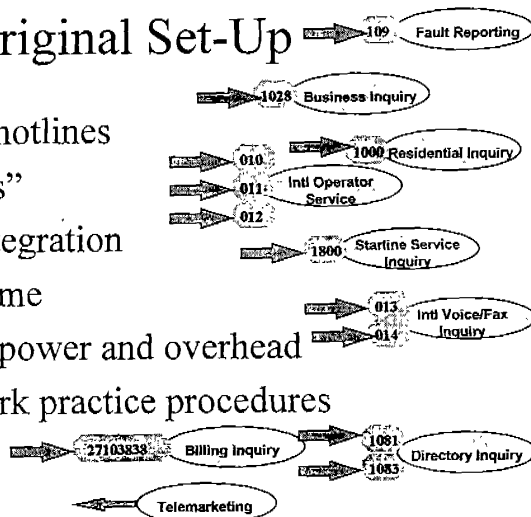- *Inconsistent customer service*

Customer Front Office Goals

- To provide best in class customer service
- To be an efficient sales channel
- To optimize operating costs
- To rationalize accommodations
- To optimize and develop people
- To capitalize on latest technology
- To develop "One-Stop-Shop" hotline service
- To provide 24-hour services
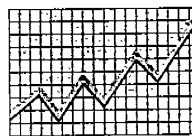
Original Set-Up

- Uncoordinated hotlines
- Many "handoffs"
- No host/data integration
- Wasted ready time
- Redundant manpower and overhead
- Inconsistent work practice procedures

109 Fault Reporting
1028 Business Inquiry
010 1000 Residential Inquiry
011 Intl Operator Service
012
1800 Starline Service Inquiry
013 Intl Voice/Fax Inquiry
014
27103833 Billing Inquiry 1081 Directory Inquiry
1083
Telemarketing

Solution: Consolidation = Efficiency

- 4 networked call center sites
- 1500+ operators
- Single agent interface to all applications
- "One-Stop Shop" for all customer services

Yuen Chau Kok
Mongkok
Ngau Tau Kok
Lockhart
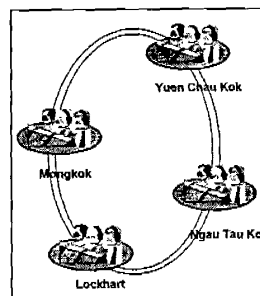
Inbound Applications

- Directory Inquiries
- International Number Inquiries
- Hotline Inquiries
- Account Inquiries
- Product and Service Inquiries

- International Dial Services
  - (booked calls, timed calls, advice duration calls)
- Service for mobile phone users
- Internet and Interactive TV

Outbound Applications

- Telemarketing campaigns
- Follow-up on overdue bill payments
- Surveys
- Service Charges
- Cross-selling
  - Interactive TV

Hong Kong Telecom CFO Benefits

To Customers :

- Reduced queueing time
- No need to repeat information to different operators
- Reduce "hand-off"

To Hongkong Telecom :

- Enhanced customer satisfaction
- Organizational efficiency
- Cost savings
- Incremental revenue streams

To Employees :

- Improved career development
- More income from extra incentives
- Higher job satisfaction

Case Study:

Sitel

- **Goals:**
  - Differentiate on size, service, technology "firsts"
  - Handle fast growth
  - Meet demanding service levels of clients
- **Challenges:**
  - Multi-lingual, highly technical clients
  - Multi-site operations
  - Growing competition (outsourcing trend)
- **Solution:**
  - Expert Agent Selection used to assign language, project, or client-specific skills to agents
  - IVR with multi-lingual speech recognition for initial call routing
  - Continued growth and excellent image around the globe
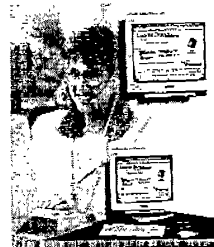
Outsourcing - leaving customer service to the experts...

CRM Technologies. . .

- Allow your customers to access your business by any means they choose
- Give you the ability to know how your customers prefer to do business
- Provide tools to most efficiently utilize your resources while providing the highest levels of customer service
- Allow your organization to meet its business goals

CRM Solutions Portfolio

Routing
- CentreVu Basic, Deluxe, Elite
- CentreVu Advocate
- CentreVu Virtual Routing
- ATM / IP Networks
- CentreVu Visual Vectors
- CRM Central

Reporting
- Basic Call Management Software
- CentreVu Call Management
- CentreVu Network Reporting
- CentreVu Explorer II
- CentreVu Visual Analyst
- CRM Performance Analyst

Resource Management
- CentreVu Advocate
- CentreVu Workforce Management
- CentreVu Call Recording

Desktop & CTI
- Callmaster IV & V
- CentreVu Agent
- CentreVu Remote Agent
- CentreVu IP Agent
- CentreVu Telephony Server
- CRM Desktop CTI
- Fastcall and Answersoft

97

AVAYA
communication
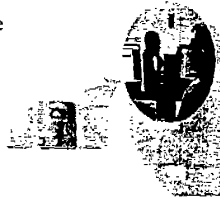
The Former Enterprise Networks Group
of Lucent Technologies