



Roadmap to Re-aligning the Customer Master with Oracle's TCA

Oracle Appsday



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Agenda

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- ❑ Trading Community Architecture (TCA) Overview
- ❑ Business Challenges at Aspect Communications
- ❑ Customer Master Assessment
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 - Data Models Prototype
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- ❑ Benefits
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Aspect Communications Background

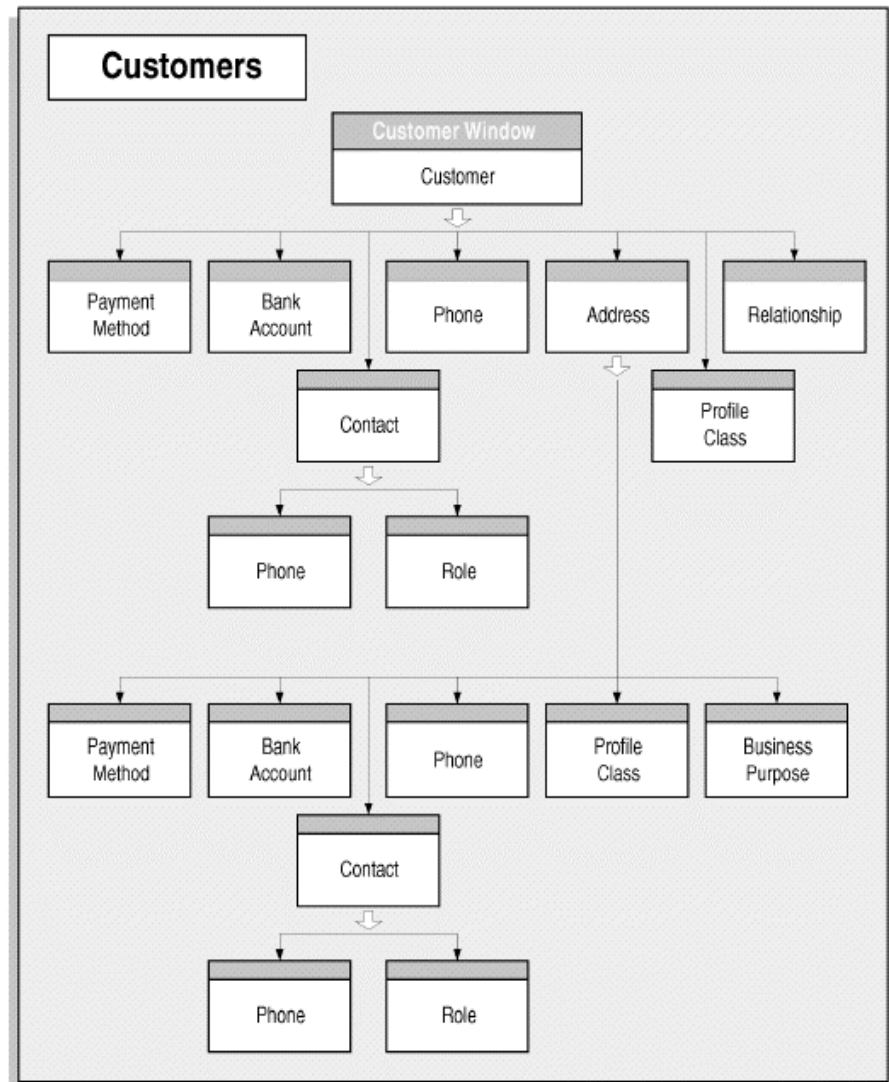
- ❑ Aspect Communications is a leading provider of call center solutions and services

- ❑ Aspect's customer base has more than two-thirds of the Fortune 50 and leading corporations in a range of industries
 - Transportation
 - Financial services
 - Insurance
 - Telecommunications
 - Retail
 - Government agencies
 - Outsourcing

- ❑ Oracle 11i implemented at Aspect Communications
 - 39 modules implemented, included the following modules:
 - Financials – GL, AR, AP, Projects
 - Manufacturing – Purchasing, Inventory
 - Order Management
 - CRM – Sales Online, Service Contracts, iExpense, iProcurement
 - Installed Base
 - Advanced Pricing and Configurator

Trading Community Architecture (TCA) Overview

- ❑ Stores customer information across Oracle Applications
- ❑ Provides a 360° view of the customers from Order Management, Accounting, Support, Sales & Marketing
- ❑ Provides tables and APIs to establish a single database of organizations, people, addresses and their relationships
- ❑ Central repository of customer data across various Oracle modules



Business Challenges at Aspect Communications

- ❑ Variety of data models
 - Customer structures were built and maintained not consistent the way the business was run
 - Models were based on historic billing account structure, not on TCA
- ❑ Duplication of customer and address information
 - Duplicate records of a single customer with a slightly different name
 - Duplicate address records within one and many customer records
 - Customer name sometimes duplicated on to Address Line 1



Business Challenges at Aspect Communications

- ❑ No standard naming conventions
 - Standard naming conventions non-existent for customer, address and contact information naming
 - Data existed in lowercase and uppercase

- ❑ Undefined relationships
 - Relationship feature was not used due to erroneous data models of customers
 - Incorrect relationship records between a customer and subsidiary and also a customer and it's partners

- ❑ Different systems to align with Customer Master
 - Automated interface between Oracle Customer Master and Clarify, which has the installed base information
 - Customer Master information used by Salesforce.com for the sales information
 - Marketing database also stores certain components of the customer data

- ❑ Limited manual monitoring and validation of Customer Master data

Customer Master Assessment

Best Practice Process Alignment® (BP²A)

Touchpoint Focus

Customers

Business Groups

Sales and Marketing

Operations -
Revenue
Management

Credit and
Collections

Service Contracts
and Support

Key Activities

Manage Prospects and
Customers Add-on Sales
Activities

Monitor Order Management
Activities

Build and Maintain
Customers

Provide Customer Service

Key Elements

- Manage Competitive Market Intelligence activities
- Develop Alliance and Partnership
- Conduct Customer Satisfaction Surveys
- Leverage relevant ERP Package functionalities
- Manage Sales and Marketing Collateral
- Manage Sales and Marketing Trade Events activities
- Manage product Education and Brand awareness activities
- Manage company and brand awareness activities

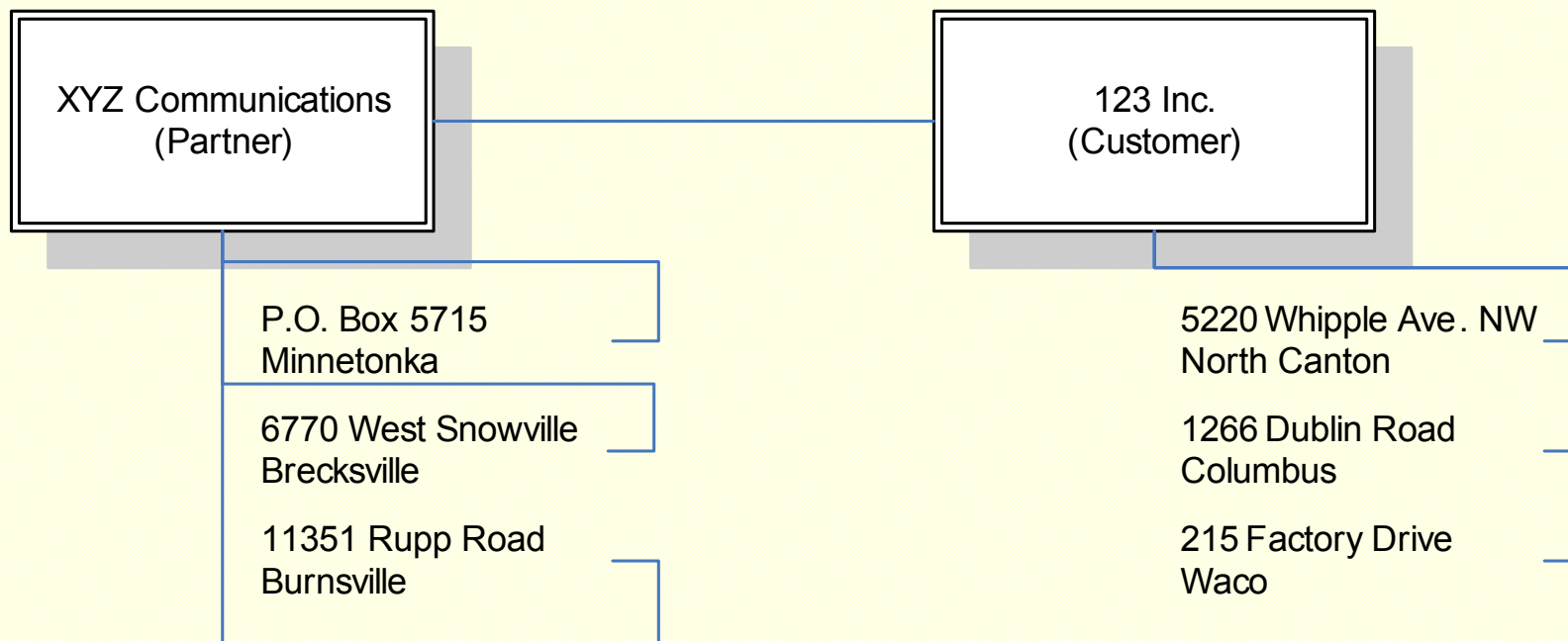
- Review and Manage Prospect and Customer Credit Profile
- Process Quotes
- Process Orders
- Manage and Track Orders
- Manage Customer Price List
- Manage Backorders
- Maintain Customer/ Order Data
- Manage Returns and Exchanges

- Manage Key Customers Profitability Reports
- Manage and Monitor Responsibilities or Relationship Manager
- Assign Account Manager to Each Account
- Monitor Account Manager Performance
- Manage and Maintain Customer Credit Profile
- Perform Periodic Customer Credit Review
- Leverage ERP Package functionalities to Support Customer Relationship
- Define Annual Business Plan for Key Customers

- Manage Service Delivery and tracking
- Provide Field Support and Service
- Monitor Customer Satisfaction
- Process Transactions and Inquiries
- Manage Product Recalls
- Manage Product Repairs
- Manage Warranties and Renewal
- Leverage ERP Package functionalities to manage service delivery

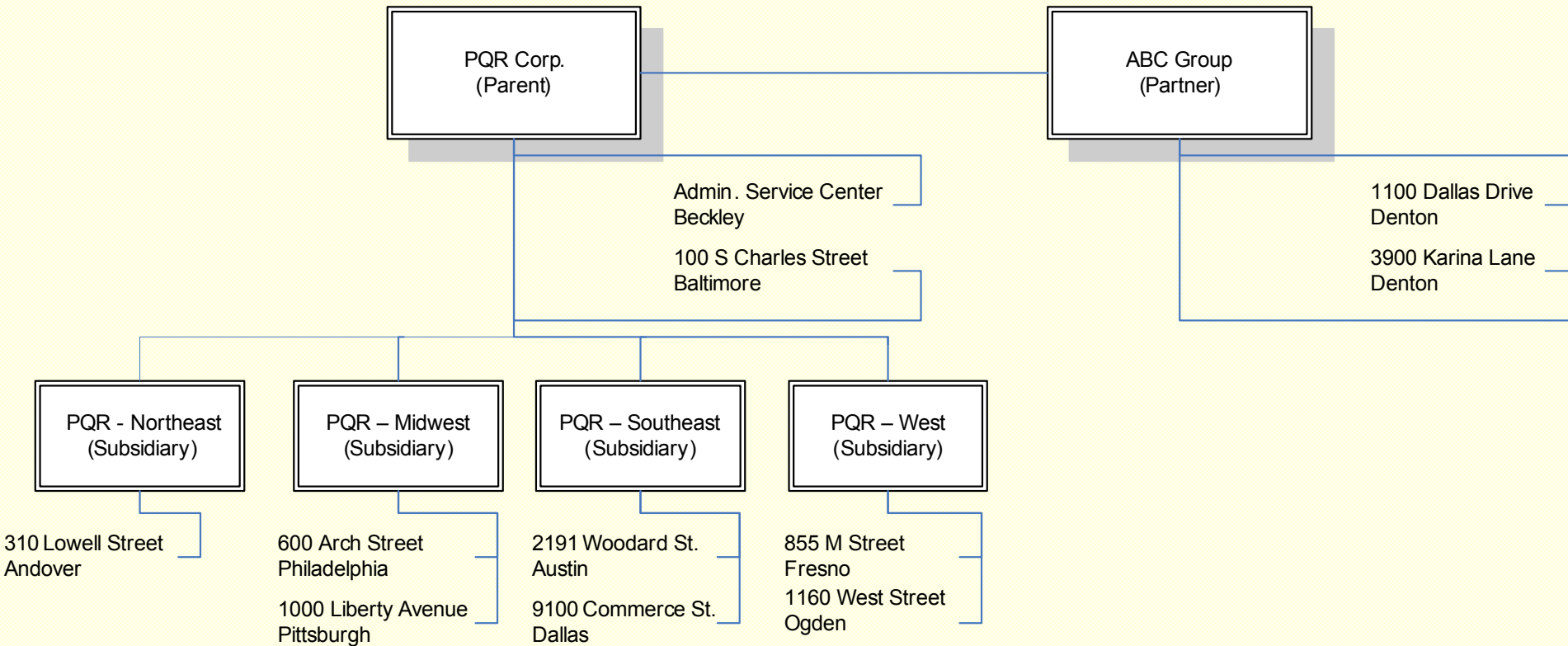
Customer Master Assessment

Partner model



Customer Master Assessment

Hybrid model



Customer Master Roadmap

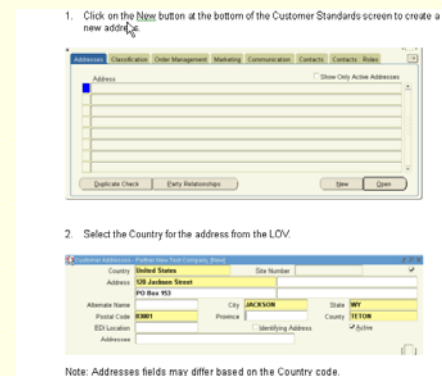
Key Objectives

- ❑ Standardized the naming convention for the Customer Name and Addresses
- ❑ Empowered Aspect Communications' end users with training and guidelines for customer record entry and maintenance
- ❑ Identification of (automated) methods and solutions available to capture and eliminate duplicate records
- ❑ Conducted Conference Room Pilot in a Test environment for manual clean-up and consolidation of customer records
- ❑ Perform clean-up and consolidation of the customer records in Production
- ❑ Appointed champions in the various business groups to ensure that after the clean up, the Customer Master data remains clean
- ❑ Implement a data quality methodology for ongoing maintenance and validation

Customer Master Roadmap

Approach – Training & Education

- ❑ Created a Corporate Standard Naming and Address Protocol in sync with a governing body like the U.S. Postal Service
- ❑ Developed customer training documents like:
 - *Customer Master Training* document for customer and address entry and maintenance
 - *Customer Master Mapping* document to address the different nomenclature used for standard fields by Oracle forms in different modules. Document addresses nomenclature for integrated CRM systems as well
- ❑ Educated Aspect Communications' business users with customer entry and maintenance guidelines



Form Description	Party Number	Customer Name	Customer Number	Location Number	Site Number
Accounts Receivable					
Customer Master	Yes a.k.a "Organization Number"	Yes	Yes	Yes	Yes
Manual Invoice / Credit Memo	No	Yes	Yes	Yes	No
Cash Receipts	No	Yes	Yes	No	No
Order Management					
Creating Orders>Returns	No	Yes	Yes	Yes	No
Quotes					
Quotes (Figure 1)	Partial	Yes	Yes a.k.a "Account Number"	NA	No
Sales Online					
Viewing in Sales Online (Figure 2, 3)	Yes	Yes	Yes	NA	Yes
Services Contracts					
Creating Service Contracts (Figures 4,5)	Yes	Yes	Yes identified in the billing tab	Yes	No
Installed Base					
Viewing Installed Base		Yes sometimes referred to "Owner Name" or "Owner Party"	Yes sometimes referred to "Owner Account"		Yes a.k.a "Location"

Customer Master Roadmap

Approach – Automated Clean-up Tool

- ❑ Researched the market for data quality software
 - Data assessment and profiling
 - Data standardization
 - Information enrichment
 - Data linking
 - Data monitoring

- ❑ Conducted software selection process
 - Ease and use for the Business Analyst user
 - Matching functionality
 - Integration with Oracle Applications
 - Ability to update the corrected data rather than append
 - Ability to schedule data correction rules and review results
 - Ability to run audit trail reports showing who and what was changed
 - Graphical Dashboard monitoring

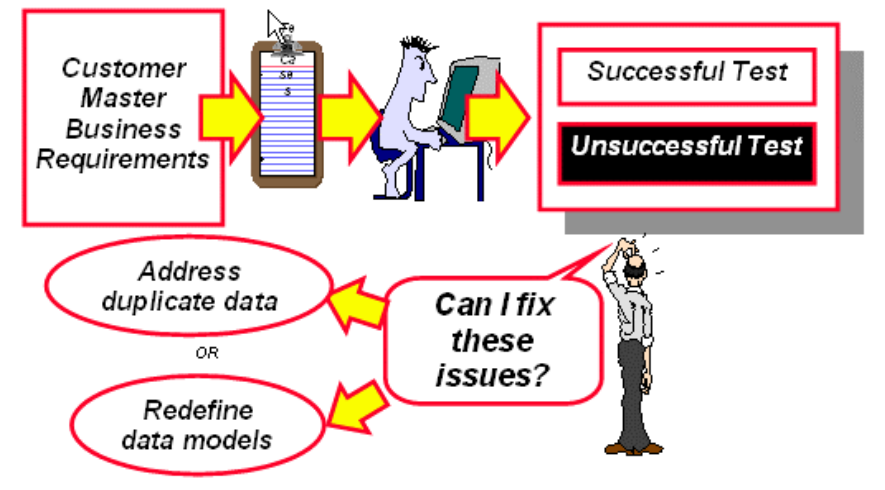
- ❑ Ability to use the automated tool with other Aspect applications like Clarify, Salesforce.com and Agile



Customer Master Roadmap

Approach – Conference Room Pilot

- ❑ Conducted Conference Room Pilot to manually clean-up and consolidate 4 customers
- ❑ CRP included clean-up of customers and some of their relationships
 - Simple customers
 - Customers with subsidiaries
 - Customers with partners



- ❑ Customer Master Merge functionality was used to merge valid addresses to a new customer created
- ❑ Full and Partial Merge checklists were developed since majority of customer records in EMEA had to be split from 1 customer (As-Is) to multiple customers (To-Be)
- ❑ Goal of the Conference Room Pilot was to assess and scope out the clean-up efforts to be done in the Production environment
- ❑ Selected a customer as Patient Zero to be the first customer to be cleaned up in the Production instance

Customer Master Roadmap

Approach – Production Clean-up Activities

- ❑ Step 1 a: Manual clean-up of the top 10 high-volume customers
 - Related customers to be cleaned up along with the top 10 customers
 - Inactivate the duplicate and erroneous address
 - Create a new customer to replace the old customer
 - Use of Customer Master Merge functionality to merge valid addresses to the new customer

- ❑ Step 1 b: Automated data clean up for the remaining customers
 - Data clean up tool will need to capture and eliminate duplicate customer and address records
 - Business rules will need to be defined for the software requirements

- ❑ Step 2: Validation of clean up and updates to the customer profiles and relationships

- ❑ Step 3: Identification of a Customer Data Quality Management Council to provide strategic guidance on the Customer Master

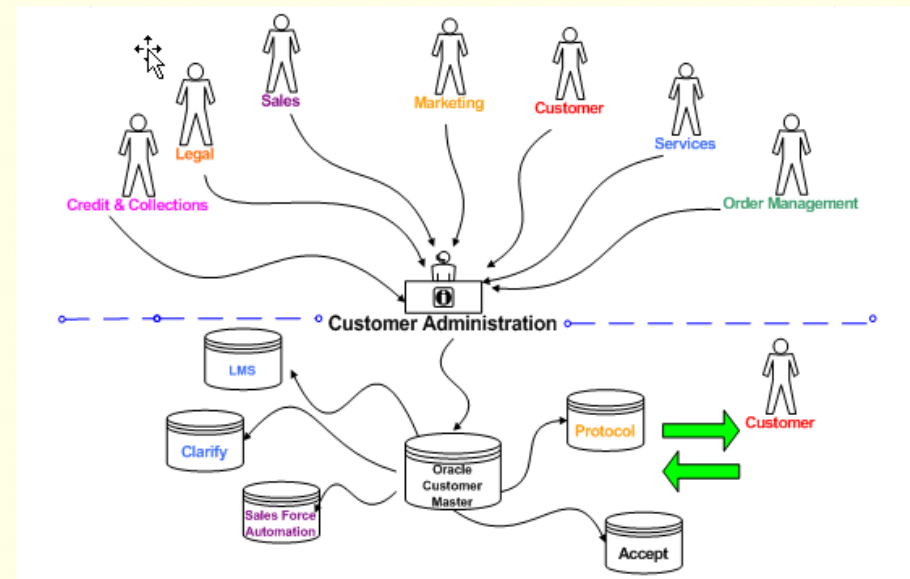


Customer Master Roadmap

Approach – Customer Data Quality Management Council

Role:

- ❑ Govern policy, protocols and data models
- ❑ Act as agents and advocates for the strategic vision of the Customer Master
- ❑ Be the stewards to data quality and integrity across the enterprise
- ❑ Review and approve any architectural changes to the core data models
- ❑ Oversee communication and education and ensure the alignment to the Customer Master roadmap



Benefits

- ❑ Provides superior customer satisfaction
- ❑ Increases operational efficiency by reducing manual processes and workarounds to compensate for lack of data quality
- ❑ Enables seamless customer interactions between the various business groups and systems
- ❑ Provides accurate information on customer facing documents and allows for increased levels in revenue collection with the streamlining of customer relationships
- ❑ Allows flexibility to mobilize business and systems for future growth
- ❑ Enables strategic reporting and analysis in order to provide insight to Sales & Marketing in the achievement of the revenue plan



Next Steps

- ❑ Complete the clean-up of Patient Zero in the Test instance
- ❑ Finalize the software selection process for the data quality management tool to be used for the clean-up and also data monitoring
- ❑ Complete training and roll-out of the data quality management tool to be used for clean-up and also data monitoring in Production
- ❑ Create a **Customer Data Quality Management Council** to monitor the Customer Master data and ensure that it remains ‘clean’ going forward
- ❑ Begin the process of clean-up and consolidation of the Customer Master records in Production
- ❑ Utilize a Graphical Dashboard to be used during the clean-up activities in Production to monitor progress and issues

Questions & Answers

For more information...

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