

Bringing Data Together and Driving CRM Forward with Siebel Analytics

By Gemma Fookes, Customer Systems plc

Reporting and analysis were traditionally seen as a useful add-on to a CRM project. However, thanks to the increasing demand on all levels of an organisation for better customer insight and sharper business intelligence, reporting and analytics are now considered to be a business-critical project in their own right.

Due to its ability to unify the massive amounts of data scattered throughout an organisation, Oracle Business Intelligence Enterprise Edition is a leading product in the reporting and analytics arena. Within the Siebel environment, this product has traditionally been known as “Siebel Analytics” and continues to be known colloquially by that name by most of the Siebel community. For simplicity we will use the name “Siebel Analytics” throughout the rest of this article. We will explore the benefits that this product can bring to an organisation, and consider how best to achieve these benefits. In addition we will look at a case study showing how, far from being simply a component of a CRM project, Siebel Analytics can actually become the key driver for a CRM implementation, by greatly contributing to increased management buy-in.

Staying one step ahead

Today’s business environment is faster moving and more competitive than ever before. To succeed in such an environment, it is essential that executives and managers throughout an organisation are able to see quickly and easily how the organisation is working. They need to be able to swiftly analyse key information in order to identify and react to changes, risks and opportunities in all business functions.

The reason this is so challenging is because critical information is often stored throughout multiple departments, and in different physical data structures across disparate data sources. This makes truly cross-enterprise intelligence extremely difficult to

achieve. Organisations must find a way to deal with these vast quantities of data if they are to make business intelligence readily available and seamlessly integrated into all business processes. However, many business intelligence tools currently on the market cannot deal effectively with data stored in this way.

Siebel Analytics is different, providing a means by which the many data storage locations and structures in an organisation can be brought together. It allows the data within these systems to be presented in a unified way, and features a range of pre-built analytical tools, enabling an organisation to execute real-time, enterprise-wide analysis and decision-making.

In addition to this core functionality, Siebel Analytics also comes with a range of advanced facilities designed to give organisations a head start in their enterprise management. Rich analytical features allow users to navigate quickly to the information that matters, and then make and implement business-critical decisions.

Uniting multiple data sources

Using Siebel Analytics, organisations can bring together the information held across their departments. For example, sales, marketing and customer care departments may all maintain separate data about customers. This data may all be stored in different formats, using different terms to describe the same metrics. In order to carry out effective data analysis it is essential that these different types of data are unified.

As well as different formats, this data is likely to be held in a number of disparate data sources – such as data warehouses, multidimensional sources, operational systems and unstructured sources – which may represent a number of different physical data structures.

Siebel Analytics was developed with precisely these problems in mind. Designed to connect to a huge range of data sources and structures, Siebel Analytics is the key to unifying the data held across systems and departments in an organisation.

A common view of the information

In order to make sense of the data from these many sources, organisations must define a single, logical view of all the information they hold. Siebel Analytics allows organisations to map this view into a simple, easy-to-understand business model where complex physical data structures are mapped to business terms that describe how a business user expresses calculations and queries. As a result, the intricacy of the underlying data is hidden, no matter how complex the physical data structures.

This common view of the information also allows organisations to define the meanings of different calculations or business metrics at a high level and to ensure that these definitions permeate every level of the organisation.

Siebel Analytics therefore provides a common, cross-enterprise view of an organisation’s entire body of information, both current and historical, through which users can gain unparalleled real-time business intelligence.

Intuitive web interface

Siebel Analytics delivers business intelligence to users by means of an Interactive Dashboard – an intuitive, web-based interface. The dashboard allows information to be presented in a highly personalised way, and allows the user to instantly see the metrics that are important to them.

Users build their own dashboard using the Dashboard Editor, a web-based environment designed to be used by business users with no programming experience, without the need for support from IT professionals.

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Users select content for a page using a simple drag-and-drop mechanism, and can even include items outside the realms of business intelligence, such as documents or corporate portals. The web-based nature also allows for swift deployment to thousands of users.

In a dashboard, information is personalised and filtered according to the user's role, and displayed through the use of reports, charts, tickers, tables and graphics. This allows a user to see, at a glance, all the measures that are relevant to them, and to quickly identify areas of interest or concern. The dashboard components are all interactive, so users can then drill down on these areas to immediately see further information, and make and implement decisions.

Usability of the dashboard is greatly enhanced by its integration with other core business applications – in particular, data can be downloaded to Microsoft Office applications such as Excel.

Guided Analytics

Guided Analytics, a feature of Interactive Dashboards, dynamically changes the appearance of the dashboard based on changes within the data being displayed. For example, sections of a dashboard can be set to only appear when certain criteria occur, such as when customer satisfaction drops below a certain level. Similarly, the same event could trigger the appearance of a message notifying the user of the situation, with a link to the relevant detailed information.

Collaborative working

Siebel Analytics provides a unique ability for users to learn from one another within an organisation. Siebel Analytics can capture best practice by monitoring the way in which more productive managers use the intelligence with which they are presented. Other managers can then be guided to use the intelligence in the same way.

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Answers. It provides users with the ability to carry out complex, ad hoc calculations and analysis. It is a web-based, point-and-click interface that hides the complex data structures beneath a logical view of the enterprise information. Users can create additional dashboard components, or even entire dashboards, which are all drillable. This content can then be embedded into the user's dashboard or shared with other users.

Siebel Answers means that users do not need to understand the underlying physical data structure or business rules in order to analyse the data held across the organisation. Data from any number of data sources can be selected with just a few clicks, and analysis can be applied easily and flexibly, since Siebel Answers does not impose a prescribed order in which calculations must be defined.

Siebel Answers can handle complex business queries which are typically very difficult to construct in SQL.

Traditionally, certain business measures were pre-calculated and stored, so that calculations using these measures could be executed simply, which of course had implications for real-time querying.

By simplifying the process for constructing queries, even where they necessitate the calculation of complex business metrics, Siebel Answers has removed the need for this pre-calculation, and so enables users to

ly monitor information and to spot patterns that are occurring within it. These changes and patterns, which may otherwise lay undiscovered within the data, can provide users with valuable insight into their business. Through Siebel Delivers, executives and managers can be sure that they have this insight.

Subject to user-defined business rules, Siebel Delivers can notify users of events and patterns occurring within the data, via a multitude of delivery channels such as e-mails and mobile devices. The user can define how they want to be notified, and can have several notification profiles, for example, depending on whether they are in or out of the office, or whether it is day or night. The notifications will include links and interactive elements, so that as well as notifying the user of changes, they also offer them the opportunity to react to them.

Disconnected Analytics

With increasing mobility at all levels of the workforce, it is essential that any analytical solution is able to cater effectively to mobile users.

Disconnected Analytics enables mobile users to access the full functionality of the application. Even when they are not connected to the network, these users can access their Interactive Dashboards, interact with the information and run and respond to ad hoc analysis.

Disconnected Analytics uses sophisticated techniques to synchronise data and metadata, which, combined with advanced compression techniques, help to minimise data set size and speed up synchronisation times.

In summary

Siebel Analytics is a revolutionary way of dealing with the vast quantities of data held within organisations. Bringing together manifold databases, applications, OLAP sources and more, Siebel Analytics provides powerful analysis of critical data, both current and historical. Information is delivered to the executives and managers who need to see it, in a timely and precise way, using a unified logical view of the information, a consistent model of the data, and uniform definitions of calculations, regardless of

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The Interactive Dashboard can also be shared, in whole or in part, with other users, which greatly aids collaborative working and decision-making within an organisation.

Oracle BI Answers

Oracle BI Answers is more commonly known among Siebel users as Siebel

combine complexity of calculations with currency of information.

Oracle BI Delivers

Oracle BI Delivers, commonly known within the Siebel community as Siebel Delivers, is the proactive component of Siebel Analytics. It allows a user to active-

whether they are connected to the network.

As well as integrating with existing data storage systems, Siebel Analytics is hot-pluggable into many IT infrastructures, and easily integrated with a host of applications and security systems. There is no need to replace existing systems, and so Siebel Analytics has an extremely short time-to-value: in fact, with the right skills and expertise, you can have your implementation up and running within just a few weeks.

Case study: Fujitsu Services

Customer Systems has worked closely with Fujitsu Services for a number of years and in that time has successfully delivered a number of services to the team that manages and supports their Siebel Sales application, including upgrades, training and support. It was natural, therefore, for Fujitsu Services to turn to Customer Systems when they needed to deliver interactive reporting to their high-level business users and had found that few of the tools available on the market offered the easily accessible, enterprise-wide solution that they needed. Fewer still had

Thanks to our exhaustive familiarity with the default functionality of the out-of-the-box Siebel Analytics application, we were able to reduce the amount of customisation required. Through extensive experience with the product, our consultants know where and when to make small changes in order to have a big impact. They are experts at working with the existing structure of the application rather than fighting against it. This expertise meant that we were able to complete the core elements of the implementation within just a few weeks.

One example was Fujitsu Services' requirement to carry out revenue pipeline analysis. Instead of tackling this requirement by means of complex calculations and customisation, we made use of a standard feature in Siebel Analytics. This feature can take daily snapshots of open opportunities and the revenue in these opportunities, and these snapshots can then be used for comparison and analysis. Through our familiarity with the capabilities of the vanilla application we were able to deliver a specific, tailored piece of functionality using only out-of-the-box features.

an add-on to the Siebel deployment, Siebel Analytics now forms an important element of the CRM strategy at Fujitsu Services, and as the new users start to rely on the speed of production, accuracy and timeliness of the reports they are generating, the level of management buy-in is expected to rise at a much faster rate than previously experienced.

In conclusion

Turning disparate data from multiple departments and data sources into cross-enterprise business intelligence is a huge challenge for any organisation. This challenge can be met relatively easily and quickly using Siebel Analytics.

Despite the incredible complexity of the analysis that can be carried out, Siebel Analytics' interface is so intuitive that it can be used by non-technical users without the need for intervention from either IT staff or professional analysts. With the right skills, experience and expertise, organisations can put this powerful business analysis at the fingertips of managers and executives within weeks.

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data marts tailored to the Siebel environment, and most of them implied an unrealistic level of investment in terms of both time and resources.

We provided demonstrations of Siebel Analytics and its ability to map complex technical structures into meaningful business terms and to deliver accurate and up to date reports. The close integration into their existing Siebel implementation, particularly the ability of the application to recognise the security and visibility controls, led to the selection of Siebel Analytics as the solution needed to bring powerful analytical capability to senior managers.

Fujitsu Services had a good level of in-house skill, but knew more expertise was required with this particular technology. Siebel Analytics is very powerful but can easily become very complex when dealing with extensive customisation requirements.

Customer Systems provided crucial help in setting up the initial development environment, and although a certain level of customisation was essential, the key to success in this project was our ability to keep this customisation as slender as possible.

As well as delivering the reports and analysis needed by the organisation, we were also able to tailor the presentation environment to the specific users who would need to use it. In particular, the application was initially set up to only run from within the Siebel application. However, the senior managers are not Siebel users and were not keen to have to use Siebel simply in order to access the analytical tools. We built a portal through which these senior users could log on to Siebel Analytics, meaning that they no longer need to launch the Siebel application every time they want to view their Interactive Dashboard or carry out analysis. To further enhance the ease of use, we also integrated the Siebel Analytics application into existing Fujitsu Services intranet portals and introduced pass through authentication so that they no longer need to log in with a separate user name and password every time they need to access the application.

Siebel Analytics as a driver for CRM

The direct interface into Siebel Analytics is now being rolled out to senior managers, and is increasing user adoption at this level within the organisation. Far from being

About the Author

Gemma Fookes is a languages graduate and senior manager at Customer Systems, responsible for marketing.

Customer Systems is wholly focused on Siebel, Siebel Analytics and Siebel Reports and has accomplished hundreds of successful implementations. Based in the UK, they have delivered services in 27 countries across 4 continents. 19% of the customers listed in Siebel's last annual report have used Customer Systems.

