

The Successful Enterprise Customer Management System

Five factors for keeping systems available and responsive



Solutions for Unbreakable Lifetime Relationships.™

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eLoyalty offers Loyalty Support™ services that were developed to address the system support, operations and maintenance needs of organizations that have Enterprise Customer Management (ECM) Systems. To manage the complexity of ECM systems, eLoyalty has developed a checklist of critical success factors that management should consider in order to provide their organizations with uninterrupted system availability and high performance.

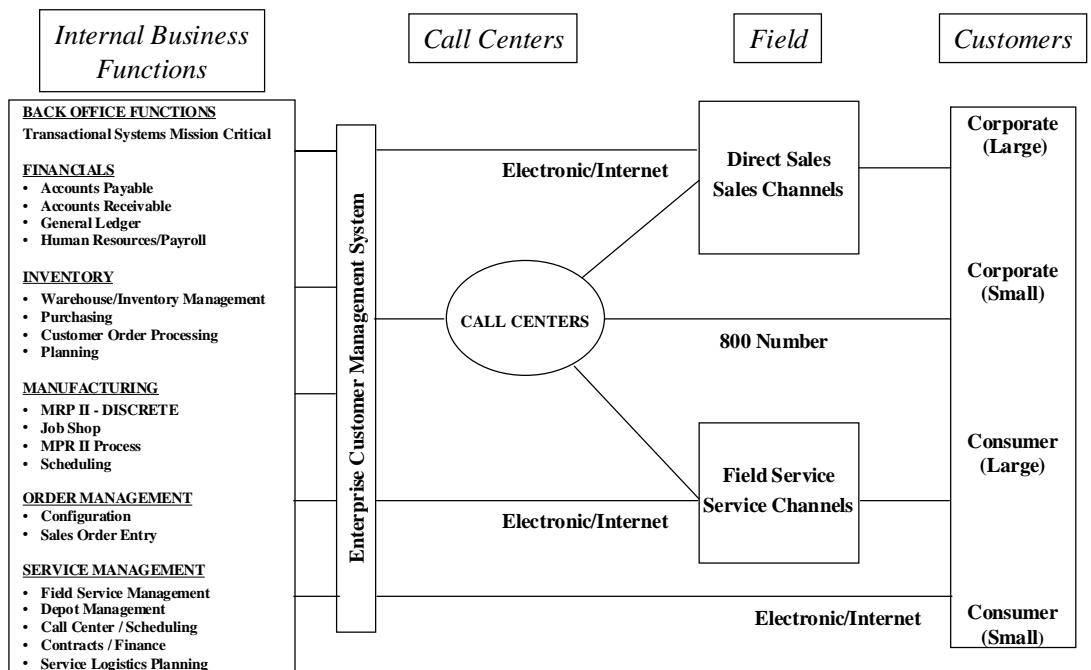
Managing the Complexity

ECM systems are mission critical, real-time systems that foster customer loyalty and drive profitability. “Delighting” customers during each interaction has become a corporate mantra. Customer service is today’s battleground for winning market share and increasing revenue. A customer service system crash or performance problem has become the companies’ worst nightmare.

Today’s state-of-the-art ECM systems are complex environments. They are integrated with multiple database systems. Voice and data networks are blended. Frequently, extensive custom integration has been required to bring together the hardware and software developed by a multitude of vendors.

Ultimately, the system’s ability to deliver business benefits depends on many factors: beginning with the design, hardware and architecture selected prior to implementation and continuing with post-implementation systems support, operations and maintenance. The Gartner Group has identified the need for reliable post-implementation and support as an important “void to be filled”. They recognized eLoyalty as one of the few systems integrators that offers post-implementation services.

**Today’s Service Environment is Highly Complex
(Internal Business Functions, Call Centers, Field and Customers)**



Loyalty Support service offerings are a suite of support services that give call centers a one-stop-shopping source for technical support, ongoing maintenance, performance measurement and operations assistance. As specialists in ongoing performance, we are pleased to present the critical questions and considerations that should be addressed to ensure the long-term success of ECM systems.

1. Have you underestimated the effort and resources required to keep ECM systems functioning?

Much easier said than done...the operations of an ECM system are very complex and encompass a wide range of factors. The following chart identifies the many factors that must be addressed. A great deal of effort and access to diverse, specialized skills is a prerequisite for keeping ECM systems up and running.



Success depends on staff availability, staff skills, costs, vendor management, customer requirements, system performance and organizational issues.

2. Do you have the right processes in place to prevent and resolve problems?

The best support is no support. Preventing a problem in the first place is the best way to achieve ECM goals. Problems can be minimized or avoided entirely through:

- Monitoring system performance
- Stress testing systems to find weak points or service level limitations
- Tuning and maintaining systems
- Knowing about the performance of system environments
- Knowing how well versions of components from different vendors work together
- Applying this knowledge to systems change management

Inevitably, problems will occur. To resolve problems in the shortest period of time organizations must have carefully conceived support processes in place. A path of communications and a problem escalation process should be established to define who needs to be contacted based on the type of problem experienced for technical and business-related issues.

The organization must also have in-depth knowledge of the many technologies and components comprising the ECM system. This underscores the critical importance of the need for knowledge transfer from the vendors that have contributed to the system.

3. What organizational structure is needed for fast problem resolution?

The process for managing outside vendors may be the single most important area of consideration. Each vendor is skilled and trained in the performance of their company's components. However, they are rarely in a position to diagnose problems from the perspective of the entire system and only take ownership of problems affecting a small piece of the system.

There are also internal organizational issues that require coordination. Because customer management systems are multi-component, the responsibility for specific components is frequently spread across the organization.

Through service level agreements, problem resolution becomes the responsibility of a single source. Regardless of where the problem lies, the service provider is responsible for diagnosing the problem and coordination both internal and external resources to arrive at the solution.

The Gartner Group has written extensively about Customer Service consultants and Outsourcers. Two key issues are raised in their research reports:

How will acquisition criteria and evaluation methodologies be used for third-party providers?

Given the importance of customer service to the enterprise, how will call centers manage third-party providers?

In "Realistic Expectations for Customer Service Integrators," Gartner warned clients about the lack of post-implementation support in contact center services. Determining staff requirements creates a series of trade-offs. Where should staff levels be set? To handle peak loads? Average loads? If you staff for low loads, how will peak demands be met? If you staff for peak loads, what will staff do when demand is low?

The need for diverse skills is paramount. Database, ACD, CTI, CIS and other experts will all be called upon from time to time. The system manager needs to understand the mix of staff skills and have the processes in place to make certain that the system is can quickly be restored in the face of any service problem that may arise.

Appropriate tools and technologies for managing the problem resolution process must be accessible. Examples of these tools include call tracking, remote access, knowledge bases, ready access to information, a test lab to replicate mission-critical problems, stress testing tools, database monitoring, network monitor and web tools.

4. What is the best way to coordinate change management?

No mission critical system can remain static when technology and the competitive landscape is constantly changing. ECM success calls for continual assessment of its fit with business requirements. As changes are introduced, the process of managing the introduction of change is vital to avoid any negative impact on system reliability and availability. An optimized change management process will keep quality high, speed a priority and costs to a minimum.

The key components of an effective change management process address:

- Maintenance planning
- Change request process
- Enhancement scoping
- Maintenance and enhancement implementation
- Testing, QA and user acceptance

5. How is your ECM system contributing to the quality of management information?

Many types of information are generated by ECM systems: systems performance relative to service level requirements, information about customers, loyalty, purchases, preferences and information about managing ongoing system support operations and maintenance.

Quality information comes from a well-crafted database design that can be easily accessed. The technologies employed by the system, including database design, data warehousing and reporting capabilities, affect how information can be collected and utilized for the benefit of the business.

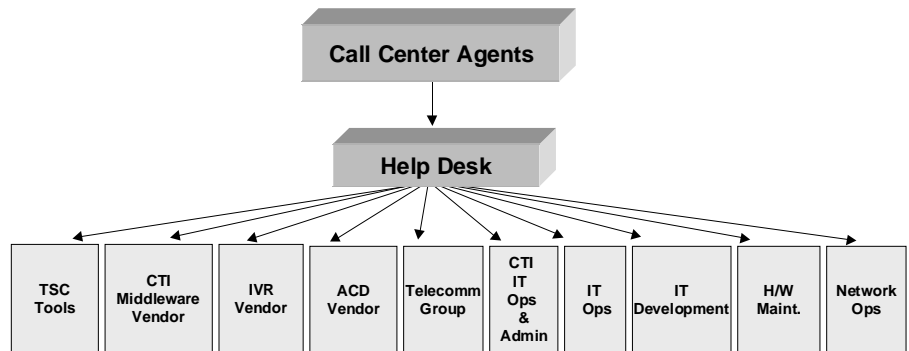
The establishment of measurable goals is necessary for evaluating system performance. It's difficult to evaluate performance without both having standards to compare actual system performance.

Loyalty Support provides the answers

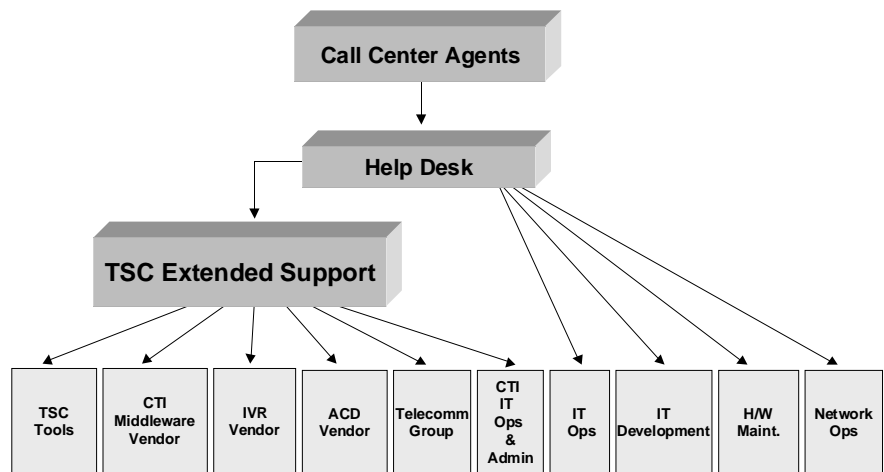
Loyalty Support services were developed to address the post-implementation challenges confronting ECM systems.

They are designed to: augment existing staff; provide in-depth skills that may not be readily available or economically feasible internally; provide a single point of contact for problem resolution; and to leverage the service providers' established relationships with various ECM vendors.

Typical Customer Service Systems Support Structure without Loyalty Support



Loyalty Support Serves as a Call Center's Call Center



Our Loyalty Support Offerings fall into four categories.

Technical Problem Support

- Problem Identification
- Problem Assignment
- Problem Resolution
- Service Level Management
- Multi-Vendor Problem Identification and Resolution
- Dispatched On-Site Service

Operations Assistance

- Call Center IT Operations
- Customer Service System Administration
- Customer Service System Performance Monitoring
- Customer Service Staff Scheduling Optimatics

Maintenance /Enhancements

- Change Management
- Updates
- Enhancements
- Testing
- Deployment

Performance Measurements/Metric Services

- Call Center Performance Monitoring
- Benchmarking

Many companies struggle with understanding the mix of staff skills, staff availability and required processes for ensuring the availability of ECM systems.

Service agreements that can be customized to the specific needs of each company provide a solution for fast problems resolution. The service provider takes total ownership of problems, and is frequently able to leverage relationships with outside vendors, eliminating the finger pointing that can sometimes occur.

Through Loyalty Support services, companies have access to diverse expertise. By sharing resources across many companies, eLoyalty can efficiently deliver experts where they are needed.

Success requires managers to think about everything, whether they account for resources internally or externally. If you don't have an answer, inevitably you will have a problem.

"We save the real difficult problems for eLoyalty," says eLoyalty client Chris Suggs, IT manager at Hewlett Packard's product-support division for the Americas. eLoyalty helped implement computer-telephony integration throughout HP's five call centers in the United States. On average, eLoyalty responds to three support calls per month from HP. "There's a lot of complexity, and it's good to have a partner to work through the problems with," said Suggs.



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