WHITE PAPER

Siebel Global Services

Siebel Project Implementation Benchmark

November 2001

SIEBEL eBusiness

Table of Contents

Executive Summary

Introduction

Since Siebel Systems shipped the first versions of Siebel *e*Business Applications in April of 1995, Siebel Global Services has worked with more than 3,000 customers to help them implement their eBusiness solutions. This experience has enabled Siebel Global Services to develop best practices and benchmarks that ensure a successful Siebel *e*Business implementation.

In this white paper, Siebel Global Services shares explicit information about these best practices and benchmarks, enabling customers to successfully plan an implementation. This document discusses the critical success factors of an implementation, a recommended Siebel implementation methodology, and how to determine the resources needed and the roles and responsibilities of a Siebel *e*Business project team. The document also presents reference projects that represent actual Siebel *e*Business implementations and the timelines and resources required to make them successful.

Successful eBusiness Projects

Customers measure eBusiness success differently. Each eBusiness initiative is unique because it is based on each organization's unique business requirements; therefore, customers choose many different criteria to measure. On a high level, most companies define success in these primary areas:

- Increased revenue
- Increased employee productivity
- Increased customer satisfaction
- Increased customer retention

Twice a year, Siebel Systems conducts customer satisfaction surveys of its entire customer base. In this survey, Siebel Systems asks its customers if they have measured results in the four primary areas, and if they have, to provide those results. Below are the average results from the Q3 2001 Siebel Customer Satisfaction Survey:

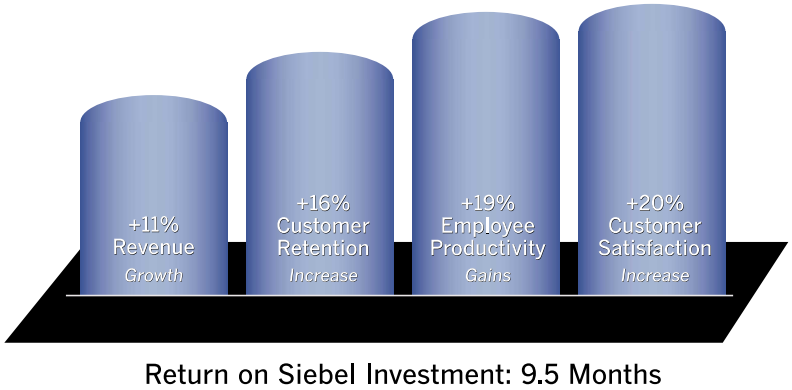

Diagram 1: This diagram provides Q3 2001 Customer Satisfaction Survey results.

In reviewing the projects that have measured and reported the best business results and highest ROI, Siebel Systems found that they follow a consistent set of best practices and use the Siebel *e*Roadmap implementation methodology. Therefore, Siebel Systems recommends that customers follow a similar approach:

Understand and Adhere to the Siebel eBusiness Critical Success Factors

Focusing on factors specific to a Siebel *e*Business project decreases the risks associated with an implementation.

- Define measurable business objectives and target return on investment (ROI)
- Secure executive sponsorship
- Actively involve users throughout the project
- Use business objectives to drive functionality
- Leverage standard Siebel functionality
- Align the technology, business processes, and compensation
- Use a phased implementation methodology with key user wins in the initial phase
- Deploy strong end user training and help desk support
- Use Siebel Certified, experienced consultants

Follow the Siebel eRoadmap Implementation Approach

The Siebel *e*Roadmap implementation methodology, designed for Siebel *e*Business Applications, ensures that each critical success factor is successfully incorporated so that the implementation is a success. The methodology specifies six stages:

- **Define**—The project team assembles, defines the project approach and scope, and implements project management controls.
- **Discover**—The project team refines and documents the functional and technical requirements aligned with the company's business goals. This objective will be accomplished by creation of detailed business process flows, documentation of detailed system requirements, and completion of a gap analysis of stated requirements against Siebel functionality.
- **Design**—The project team designs a hard copy mock-up of the solution and uses the Discover Stage requirements to develop application screen flows and design layouts.
- **Configure**—The project team configures the application, extensions, and external interfaces required to support the new system.
- **Validate**—The project team conducts a full-function system test of the application using production data. Key users then perform an acceptance test to validate user requirements.
- **Deploy**—The project team first conducts a Production Pilot, which field-tests and revises all aspects of the new system—user training, technical infrastructure, the network, and the help desk. The team then focuses on a successful transition from the Production Pilot to a complete rollout.

Deliver a Production Pilot for the Initial Deployment of Each Phase

Rolling out the new system to a small group of users provides feedback on how easy the new functionality is to use, the performance of the network, the effectiveness of the user training, and the responsiveness of the help desk.

Siebel Systems Benchmark

Using our recommended phased approach, a typical implementation of Siebel *e*Business Applications requires an average of 13 weeks, with a 12-member implementation team, consisting of seven customer members and five consultants from a systems integrator and Siebel Global Services.

Because every project is different, both the number of consultants needed and the time needed to complete the project vary. Customers have implemented Siebel *e*Business Applications in large global corporations with multiple divisions and locations worldwide, as well as in small corporations with only one site, so the length of projects can range from four weeks to seven months.

The ultimate size and duration of the implementation is determined by the scope and functionality of the project itself; the use of the Siebel *e*Roadmap; and the number of people provided by the customer, the systems integrator, and Siebel Global Services.

Summary

Siebel Global Services has been helping customers implement business solutions since 1995. These implementations have enabled corporations to increase revenue, productivity, and customer satisfaction.

Siebel Global Services looks forward to helping each company develop a project plan specific to its situation. For more information, or to schedule an appointment with a Siebel Certified Consultant, please call 1-888-465-9755.

Siebel Project Implementation Benchmark

Purpose of this Document

This document is for business and information technology executives planning Siebel *e*Business Applications implementations. It describes the characteristics of successful implementations and outlines a timeframe and resource benchmark based on a prescribed implementation approach. In addition, this document presents examples of Siebel *e*Business implementations, enabling business and IT leaders to compare their situations to those of comparable companies in the same industry.

Project teams can achieve success by:

- Understanding and adhering to Siebel Systems' critical success factors
- Following the Siebel *e*Roadmap implementation methodology
- Delivering a Production Pilot for the initial implementation of each phase

Critical Success Factors

With experience in more than 3,000 Siebel implementations and results from quarterly customer surveys, Siebel Global Services has identified the characteristics that successful projects have in common:

Measurable Business Objectives that Drive ROI

Clearly defined business objectives keep the project focused, minimize changes in scope, and ensure expected results. The business objectives must be functionally specific such as "Reduce technical support response times by 20 percent" rather than "Improve technical support." Once objectives are set, measurement criteria and goals should be mapped to each objective. For example, a measurement criterion for "Reduce technical support response times by 20 percent" might be "Total customer hold time for all calls relating to a customer service request," and the goal might be to reduce the hold time by one minute.

Before deploying the Siebel *e*Business solution, the project team should take a current reading for each particular measurement criterion. This serves as the baseline against which return on investment is measured. After deployment, customers should measure key criteria regularly and compare results against the baseline and prior readings. With regular measurement, customers can continue to drive business benefits from their Siebel *e*Business Applications.

Examples of Business Objectives
Reduce the time to generate a quote from one hour to ten minutes by creating a Web-based quote system.
Increase renewal sales and cross-sales by 20 percent via automated marketing campaigns.
Deploy a Web-enabled, self-care solution that reduces costs by 15 percent and increases customer satisfaction by 25 percent.
Increase employee productivity 20 percent by creating a central, shared repository of customer data that eliminates extensive manual data manipulation.

Diagram 2: This table provides examples of eBusiness Objectives.

Executive Sponsorship

Since initiatives are strategic projects, they require top management commitment to succeed. The executive sponsor helps keep a project on time by providing resources and resolving issues in a timely manner. For example, the executive sponsor meets with key staff to review project risks, issue reports on a regular basis, identify mitigating strategies and actions, and assign action items.

The project sponsor forms a steering committee composed of key project stakeholders and the project team in order to identify and resolve project issues from a business management perspective and to review and approve critical changes to the project that affect the schedule or the functionality of the solution.

User Involvement

The system must meet the business requirements of users if they are to take advantage of new functionality. Therefore, users play a key part in an implementation, and key representatives from each functional area of the organization should be designated as part of the project team. The end user representatives participate in the definition of business requirements and approve the business design. During development, they participate in user labs to verify that the system meets their needs. End users also participate in End User Acceptance Testing and the Production Pilot.

Functionality Based on Business Objectives

The decision to implement a solution must be based on business objectives, and each feature and configuration decision must be based on improving the business processes to achieve those objectives. If a feature or functionality does not meet those criteria, it should not be implemented.

Standard Siebel Functionality

Excessive customization is one of the most common reasons deadlines are missed and budgets are exceeded in technology projects. The first step in keeping customization to a minimum is selecting the technology that best meets the organization's business requirements and business process needs.

The second step is to ensure that the project team and end users have a clear understanding of the standard Siebel functionality during the Design Stage of the project. They can then determine which business processes can be implemented using standard Siebel functionality and which, if any, may need customization. This reduces configuration and scripting, avoids configuring what is already in the system, and ensures that customization is only used to implement unique, value-added processes that meet business objectives.

Alignment with Business Processes and Compensation

For an eBusiness implementation to be effective, technology solutions and business processes must be aligned with the compensation and rewards of the people affected by the implementation. The decision to alter existing processes, technology features, or compensation must be determined by the organization's stated business objectives. If adjusting technology to match an internal process does not contribute to the achievement of business objectives, then that change should not be made, and more than likely, the process itself should be assessed and modified. In addition, because the introduction of new technology and business processes gives end users new activities and responsibilities, their compensation must be adjusted to drive desired new behaviors.

A Phased Implementation Methodology

Successful implementations use a phased approach that ties each major business objective to a phase. A phased approach provides the following benefits:

- Produces quick and incremental ROI, which generates enthusiasm and increases the probability of project success and continuance
- Allows end users to quickly become productive, experience the benefits of the project as early as possible, and learn the system more efficiently in smaller increments
- Allows implementation teams to learn by doing while testing design options in a low-risk format
- Isolates potential problems and minimizes surprise by defining the scope of the project well in advance
- Gives an organization more time to understand and assess its future requirements and to make changes more easily during the implementation process
- Reduces risk, partly because risk is easier to manage in smaller chunks

End User Training and Help Desk Support

End users often resist change. A clear training strategy addresses their concerns in a proactive manner through the following strategies:

- Comprehensive training of managers and users to demonstrate how the system meets their business needs
- Regular "town meetings" with user representatives to keep them up to date on the progress of the project and the features of the solution
- Regular communications to the end users describing the project's benefits, the schedule, and the progress to date

Certified, Experienced Consultants

One of the most important success factors in any Siebel implementation is the use of consultants who are specifically trained and certified on Siebel *e*Business Applications. Certified, experienced consultants ensure the speed, accuracy, and thoroughness with which Siebel *e*Business Applications are implemented. They are essential in completing a project on time and on budget.

Siebel Systems created the Siebel Certified Professional Program to establish standards and credentials, which become the customer's guarantee that the consultants working on the project have the necessary skills to install, configure, and administer the Siebel *e*Business Applications successfully. Siebel Systems strongly recommends the use of Siebel Certified Consultants who have been certified on the most current releases of Siebel *e*Business Applications.

Diagram 3: This logo represents Siebel Certified Professionals specifically trained and certified on Siebel eBusiness Applications.

A phased rollout using the Siebel *e*Roadmap:

- Focuses each phase on a specific business objective
- Generates enthusiasm with quick wins
- Allows end users to learn in smaller increments
- Allows implementation teams to learn by doing
- Tests design options in a low-risk format
- Identifies potential problems and minimizes unexpected obstacles

Siebel eRoadmap Implementation Methodology

Overview

The Siebel *e*Roadmap implementation methodology is an accelerated approach that ensures all critical success factors are in place and executed. The methodology focuses on both the strategic and the tactical areas that maximize the customer's ROI while minimizing its business risk.

The Siebel *e*Roadmap groups major implementation deliverables into six stages, assuring proper project management and control techniques throughout the implementation project. In addition, the methodology's Project Management components support a formal review process to ensure project quality.

Not all projects require every stage and activity outlined in this document. The staged approach is flexible, allowing the project team to address all requirements and select specific methods and techniques as needed.

Although the Siebel Systems methodology focuses primarily on providing guidance for implementing Siebel *e*Business functionality, it also defines project management best practices in the areas of risk avoidance, task and time management, issue control, quality management, status reporting, milestone management, and scope change management. The Project Manager works with the project team and the executive sponsor in assessing and resolving risks and issues throughout the project life cycle.

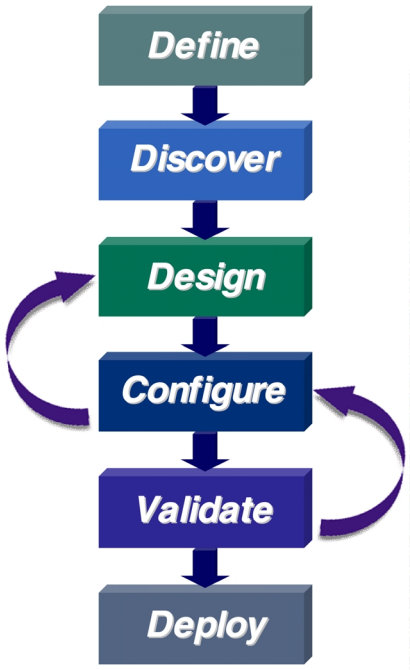

Diagram 4: This diagram shows the Siebel *e*Roadmap implementation methodology—an accelerated approach that ensures all critical success factors are in place and executed.

Organizing the Project Team

Siebel *e*Business implementations can be led by the customer, by systems integrators, or by Siebel Global Services; however, a Siebel project implementation team is almost always a blended team that combines customer representatives, system integrator consultants, and Siebel Certified Consultants to create an Integrated Project Team (see diagram 2). The makeup of the Integrated Project Team usually changes over the course of an implementation, so that most Siebel customers become self-sufficient.

The Integrated Project Team includes a Steering Committee, which is an oversight organization made up of customer, Siebel Systems, and systems integrator executives. The Steering Committee has ultimate responsibility for resolving conflicts, issues, and problems as well as making final decisions on scope changes. A subset of the Integrated Project Team forms the Project Management Team—a customer Project Manager, a Siebel Project Manager, and a Siebel Systems Architect—which is responsible for jointly managing the project.

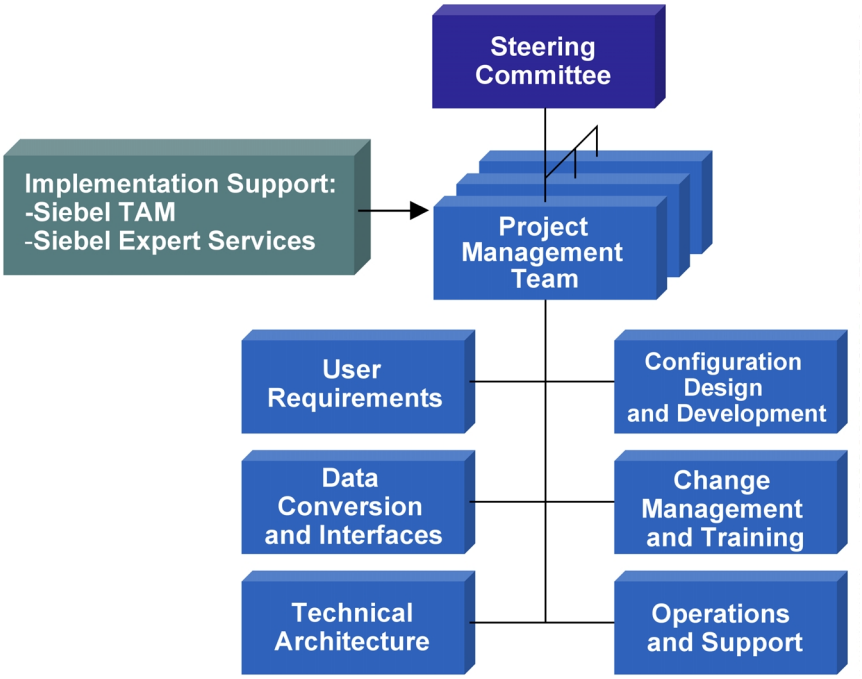

Diagram 5: This diagram provides a high-level illustration of the entire Integrated Project Team.

The following provides a high-level definition of each team throughout the stages of a project implementation.

Siebel Technical Account Managers

The Siebel Technical Account Manager (TAM) is the lead Siebel technical advisor and the customer's advocate within Siebel Systems. The Siebel TAM has many roles in the project and is ultimately responsible for its success. For example, the Siebel TAM works closely with an integrator and/or the internal project team as a technical advisor. The TAM participates in the steering committee meetings, acting as the liaison between the business and implementation teams. Through weekly reports, the TAM ensures that Siebel management is kept current on the overall state of the customer's Siebel experience.

Siebel Expert Services Consultants

Siebel Expert Services Consultants provide a series of configuration and architectural reviews throughout the project. These consultants have a deep understanding of a broad range of topics related to the development and deployment of Siebel *e*Business Applications. They work directly with Siebel Engineering and Siebel Quality Assurance to develop in-depth, product-specific knowledge.

Siebel Project Quality Reviewers

The Siebel Project Management Office (PMO) provides independent project quality reviews to ensure that the project is managed in accordance with Siebel Systems' best practices and quality processes. These reviews assess project planning, project control, progress against plan, adherence to Siebel Systems' methodology, forecast of remaining effort, change control, customer satisfaction, and quality control. They provide guidance to the Project Management Team on best practices and provide critical feedback to the Executive Team for early warning of project risks and issues.

Business Analysis Team

The Business Analysis Team defines business requirements and transforms them into a working business design. The team provides feedback during the user labs and approves the user acceptance criteria. IT business analysts usually staff the Business Analysis Team along with users from the extended project team.

Systems and Data Integration Team

The Systems and Data Integration Team designs and develops the interfaces and data conversion programs and cleanses legacy data. The customer usually provides the members, but the team can be supplemented with Siebel Certified Consultants or other Siebel Certified subcontractors.

Technical Architecture Team

The Technical Architecture Team provides design recommendations, including network, capacity, and performance planning. The team acquires, installs, and implements the infrastructure and makes the infrastructure available to support development, test, and production projects. To accommodate knowledge transfer and enable the company to manage its own operations, the customer provides most of this team's members, supplemented with Siebel Certified Consultants.

Configuration and Design Team

The Configuration and Design Team designs, builds, and tests the screen configurations and application extensions. It also develops the application technical documentation. This team is staffed primarily by Siebel Certified Consultants working with customer staff to encourage knowledge transfer.

End User Training Team

The End User Training Team creates the training curriculum, develops the instructor and user training materials, and delivers the training. This team works closely with the Deployment Team and can be staffed by customer or Siebel Systems/systems integrator personnel, but a joint approach is recommended. The ultimate success of a deployment depends on well-executed user training.

Deployment Team

The Deployment Team develops the overall deployment strategy. They identify the pilot group and determine the timing and approach required to roll out the system to the entire organization. The Deployment Team also does the first administrative data setup and establishes help desk and user support procedures. The customer usually staffs this team with assistance from the Siebel End User Training group.

Six Stages of the Siebel *e*Roadmap Implementation Methodology

Define Stage

This initial phase identifies project stakeholders and determines the roles and responsibilities of project team members from the customer, Siebel Systems, and the systems integrator. It also defines the control structure for project management, creates all project planning documents, and validates the customer's business problem—including the metrics employed to measure the project's success.

The Project Management Team, which includes project managers from the customer, Siebel Systems, and the systems integrator, jointly conduct planning activities such as:

- **Project Planning and Startup**—Includes creating documents such as the work breakdown structure, the project management and control plan, and the risk assessment and mitigation plan
- **Project Control and Reporting**—Includes establishing issue and risk tracking procedures and status reporting mechanisms
- **Project Quality Planning**—Includes planning for Siebel Expert Services design and configuration reviews, team walkthroughs, scheduled project quality reviews, and periodic project audits

During this stage, the Business Analysis Team will:

- **Refine Business Objectives**—To ensure that the project stays focused on solving business goals
- **Refine High-level Project Scope**—To verify the scope of this phase of the implementation versus subsequent phases

Discover Stage

During the Discover Stage, the Integrated Project Team—which consists of customer, Siebel Systems, and systems integrator staff directed by the Project Management Team—identifies and documents the key issues before starting the Design Stage. Activities include:

- Discovering, refining, and documenting the customer's functional, technical, data, capacity, architecture, performance, and training requirements
- Completing a Gap Analysis to highlight the differences between the customer's requirements and the standard features of the relevant Siebel *e*Business Applications
- Setting up the development environment, including the installation of server, customer, and network hardware and software, and building databases

- Pinpointing custom functionality and interfaces to external systems
- Developing the strategies for deployment and user training
- Building a detailed project plan for the remaining implementation stages

Design Stage

The main objectives of the Design Stage are to design a solution that best meets the customer's business requirements and prepare the solution for training and tests. Deliverables of this phase include:

- **System Design Specification**—Shows how customer requirements are met by the software and includes data models, screen definitions, business rules, reports, external interfaces, and scripting requirements.
- **Data Conversion Design**—Documents how legacy data is migrated into the Siebel *e*Business environment.
- **Unit and Integration Test Plans**—Show how components of the solution will be tested individually and as an integrated system. These plans address functional testing, performance testing, and regression testing.
- **Customer Acceptance Test Plan**—Identifies what criteria (based on the Requirements Matrix) must be met and which tests must run successfully before the customer will accept the system.
- **Siebel Expert Services Design Review**—Analyzes the application architecture and design to ensure that they follow Siebel Systems' best practices.
- **Siebel Project Quality Review**—Measures the Integrated Project Team's adherence to standards and approved methods.

Configure Stage

During the Configure Stage, Siebel Certified Consultants configure the application, provide required extensions and external interfaces, and prepare the customer's organization for the deployment and support of the Siebel *e*Business solution. This stage includes these deliverables:

- **Configured Siebel *e*Business Software**—Meets the customer's specifications.
- **Configuration Review**—Ensures that the configured application follows Siebel Systems' best practices.
- **Application Support Plan** (based on the support requirements documented in the Requirements Specification)—Specifies how databases, networks, servers, and applications are administered. The plan also identifies help desk practices, problem resolution processes, and escalation procedures.
- **End User Training Curriculum**—Identifies the formal and informal training needed to bring the customer's end users to the desired proficiency levels.

- **Test Environment**—Installs test hardware, loads software, and builds databases.
- **Cut-over Plan**—Outlines the steps to move from the "test sandbox" to Production Pilot and the eventual deployment of the full production environment.

Validate Stage

The Validate Stage is a full-function test of the new system. Deliverables include:

- **Customer Application Tests**—Comply with the Unit and Integration Test Plans.
- **Training**—Implements the plans developed during the Design Stage, prepares the customer's staff, and runs pilot testing for those who will use and/or maintain Siebel *e*Business Applications.
- **Production Environment Validation**—Ensures that production hardware is installed, software is loaded, databases are built, and data is prepared.

Deploy Stage

In the first activity of the Deploy Stage, the Production Pilot tests the solution's readiness for a full production deployment. This test is conducted in one part of the customer's business environment such as a region or district.

The Deploy Stage brings all elements of the implementation together to move from the Production Pilot to full deployment. During this stage, the remaining users are trained, the help desk is implemented, ongoing operational support is readied, and the Integrated Project Team completes final configuration and tuning based on what was learned in the Production Pilot. Additionally, the Integrated Project Team closes out the project, debriefing all stakeholders, archiving project artifacts, and conducting customer satisfaction surveys.

Production Pilot

A Production Pilot enables the customer to test the new solution with a small group of users. This approach enables the project team to capture feedback and make corrections before extending the system to the entire organization. Because real users execute the Production Pilot on the production system, feedback is based on real-world experiences. It includes users' opinions on ease of use and response time, plus data on the effectiveness of the user training, the responsiveness of the help desk, and efficiency of the operational procedures.

Siebel *e*Business Implementation Benchmark

Timeframe Benchmark—13 Weeks

The time it takes to implement Siebel *e*Business Applications depends on the size of the organization. Small corporations generally implement Siebel *e*Business solutions in four to six weeks. Other first phase implementations take as long as six or seven months. Projects that follow the recommended implementation approach average a first phase implementation time of 13 weeks followed by a four-week Production Pilot (see diagram 3).

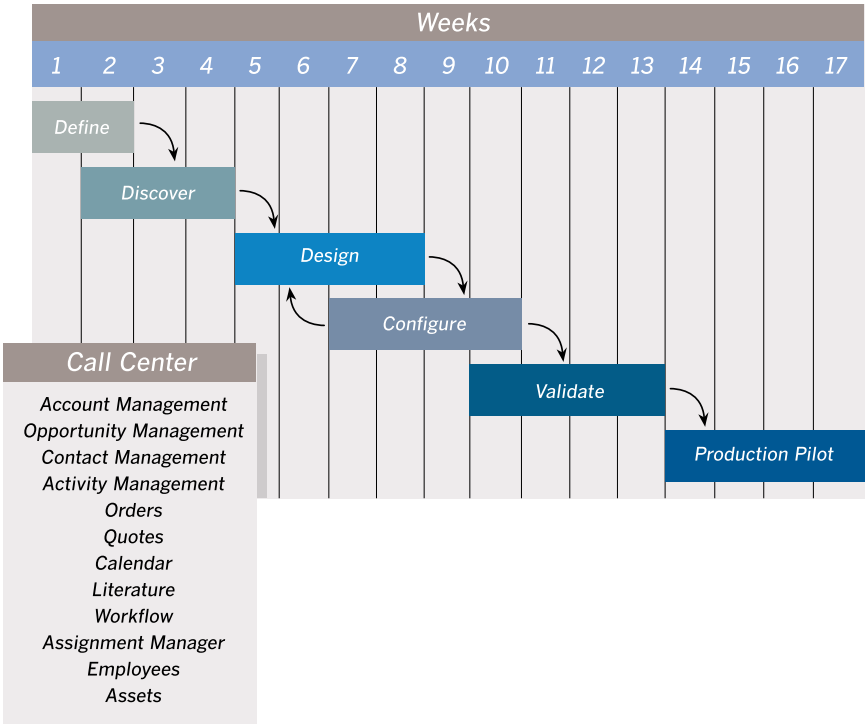

Diagram 6: This diagram provides an example of an implementation project completed within the 13-week benchmark, with a four-week Production Pilot.

A full deployment phase follows the Production Pilot. The deployment timeframe usually varies from one to several weeks, depending on the number of users, divisions, and number of countries covered by the rollout.

Lengthy Implementations

An implementation cycle of nine months or longer is a warning sign. Lengthy implementations usually result from a lack of sponsorship, ill-defined business needs, or an approach that fails to leverage the standard software. The company typically ends up with an over-configured system that does not meet its business needs.

Using the recommended phased approach, the 13-week benchmark is valid for all Siebel *e*Business Applications.

Post-implementation Changes

After implementing the first phase, the project team re-evaluates the requirements for future phases. As users learn to use the Siebel *e*Business Applications, one of several things may happen:

- End users may determine that the base system meets their needs
- End users may request additional functionality
- The business may change, requiring additions or changes to the business rules and the addition of functionality to the Siebel *e*Business solution

Since the Siebel *e*Business solution becomes a major part of the infrastructure supporting the business, as the business changes, so will the Siebel *e*Business solution. For this reason, many companies put small, ongoing implementation teams in place to enhance Siebel *e*Business functionality as the need arises.

Resource Benchmark—12 Project Members

Because projects vary based on the size of the company and its business requirements, the number of consultants needed for the implementation also varies. The number of consultants depends on the timeframe of the implementation and the functionality of the solution as well as the number of individuals provided by the customer. A company can implement very small projects with the assistance of only one consultant. A very large project can require as many as 15 consultants dedicated to the Siebel *e*Business implementation.

Project Team Benchmark **12 Project Members**	
7 Customer Resources	**5 Siebel Systems/Systems Integrator Resources**
Project Manager	Project Manager
Business Analyst	Business Analyst
Database Analyst	3 Technical Consultants for configuration, interfaces, and conversions
Network Specialist	
System Administrator	
Interface Specialist	
Report Developer	

Diagram 7: This table provides an example of Project Team Benchmark.

The section *Organizing the Project Team* described in detail the roles and responsibilities of a typical Siebel *e*Business project team. Although each project requires that resources be organized into individual teams, the overall size of the project determines the resources needed for the entire team. Project team members for smaller implementations may fill multiple roles and thus may be part of several individual teams.

A Siebel *e*Business project team that follows the standard Siebel *e*Business implementation approach typically consists of 12 members:

- Seven customer members
- Five consultants from a systems integrator and Siebel Global Services

The customer usually provides a Project Manager, a Business Analyst, a DBA, a Network Specialist, a System Administrator, and at least two or more people to assist with interfaces and reporting. The systems integrator usually provides a Project Manager, a Business Analyst (to help define business requirements), and three technical consultants to assist in configuring the Siebel *e*Business screens and developing the interfaces and conversions.

Siebel Global Services recommends that Siebel staff fill certain key roles. Successful projects regularly engage a Siebel TAM and use Siebel Expert Services in a proactive review capacity. The Siebel TAM assists the project team with its implementation and works closely with the customer to understand how Siebel *e*Business technology serves larger corporate objectives.

User training is a vital consideration. Successful projects address this issue at the beginning rather than leaving it until after the system is completely designed and developed. Outside training consultants often develop training materials, coordinate training logistics, and conduct user training courses. Projects usually require a training coordinator and two or three training developers depending on the functionality being implemented.

Implementation Budget Guidelines

With more than 3,000 successful implementations completed, Siebel Systems has been able to develop budget guidelines to help customers understand the costs required to implement Siebel *e*Business Applications. The table below shows the average costs for each of the recommended services supporting Siebel *e*Business implementations.

Siebel *e*Business Implementation Budget Guidelines	
Implementation Services	**Guidelines**
Enterprise	$2.50 services/$1 software
MidMarket	$1 services/$1 software
Technical Training	10 percent of software expenditure
Other Services	**Guidelines**
End User Education	$1,000 per user
MultiChannel Effectiveness*	$1,700 per user/per process
SiebelNet Managed Services	$1.75 per user/3 years/$1 software
SiebelNet Hosting Services	$3 per user/3 years/$1 software

Diagram 8: This table shows the budget guidelines for services.

Summary

Siebel Global Services has helped customers implement business solutions since 1995. These successful implementations have enabled corporations to achieve the following business goals:

- Increased revenue
- Increased employee productivity
- Increased customer satisfaction
- Increased customer retention

Although this best practices document provides guidelines for understanding the time and resources required to implement a Siebel *e*Business solution, each business situation is unique. Customers must clearly define their business needs to develop an implementation approach that works.

For more information, or to schedule an appointment with a Siebel Certified Consultant, please call 1-888-465-9755.

Appendix A—Reference Projects

The following projects represent successful Siebel *e*Business implementations and the time and resources required to make them successful. The timelines outlined below cover the period from the beginning of the project to the start of the Production Pilot. As discussed, the time required to deploy the implemented functionality to the entire corporation depends on many factors, including the number of users and their geographic locations.

Product and Industry	Objective	Time Frame	Resources
Siebel eFinance, Finance	Change the business into a customer-centric organization	7 weeks	5 Consultants 1 TAM
Siebel Marketing, High Technology	Combine multiple customer databases into one for easily exchanging contacts and leads	10 weeks	6 Consultants 2 Trainers
Siebel eService, Finance	Become the premier online service provider	11 weeks	3 Consultants 1 TAM
Siebel eFinance, Banking	Provide better information about customers and prospects as well as increase up-selling and cross-selling	14 weeks	1 Consultant 1 TAM
Siebel Sales, Manufacturing	Improve management of customer activities, sales pipelines, contacts, and customer agreements	16 weeks	4 Consultants 1 Part-time Consultant 1 TAM
Siebel Service, High Technology	Create an enterprise-wide intelligence and planning system for problem resolution and knowledge management	20 weeks	3 Consultants 1 Part-time Consultant 1 TAM
Siebel eService, Mobile Communications	Provide a robust multilingual, multichannel contact and campaign management system to improve call center service	24 weeks	8 Consultants
Siebel ePharma, Pharmaceuticals	Deploy an easy system for managing physician calls and sample drops	28 weeks	6 Consultants 1 TAM
Siebel Call Center, Finance	Launch a Planner Portal for lead management and a Web-based quotes system for channel partners	16 weeks	3 Consultants 1 TAM
Siebel Call Center, High Technology	Implement an outsourced customer care call center to enable agents to provide superior service support	8 weeks	4 Consultants 1 TAM
Siebel Call Center, Public Sector	Implement a multichannel call center solution to increase organizational and operational efficiency and enhance financial performance	22 weeks	3 Consultants 1 TAM
Siebel eInsurance, Insurance	Establish a contact center to sell a new stakeholder pensions product and meet U.K. legislative changes for the April 2001 tax year	19 weeks	1 Consultant 1 TAM
Siebel Interactive Selling, Communications	Create a single Web-based order experience for dealers and distributors by deploying a stand-alone configurator	16 weeks	2 Consultants

Diagram 9: This table provides the reference projects outlined in Appendix A.

Siebel *e*Finance—Financial Services Industry

Business Objective

Transform the business into a customer-centric organization by consolidating customer-facing processes around a single customer relationship management platform.

Organizational Structure

A large insurance group of 24 regional companies, selling to businesses and private customers through field sales, customer call centers, brokerages, and external agencies.

- **Users**—The Phase I deployment included a small Production Pilot rolled out to ten field sales users in a single area. Following successful appraisal of the pilot in the first quarter of 2000, the deployment was expanded to approximately 250 field sales users and broker support staff (Phase II). The complete solution was rolled out to an audience of 2,500 field sales, contact center, broker support, and management users during Phase III in the first quarter of 2001.
- **Languages**—English.

Siebel *e*Business Functionality

The company is using Siebel *e*Finance, with an emphasis on cross-divisional account, contact, and opportunity management. The company also uses Siebel Correspondence and Siebel Campaign functionality for limited targeting of customer groups by field sales personnel. Users have read-only access to life, non-life, and auto policy information imported on a regular basis from legacy systems.

Interfaces/Conversions

- **Interfaces**—Interfaces enable regular batch import of customer, contact, and insurance policy data from in-house AS/400- and OS/390-based legacy systems. Interface development began in the second week and continued throughout the duration of the project.
- **Conversions**—None. Existing systems are currently maintained as master systems for customer information. Siebel Systems will become the master system in Phase III.

Project Implementation Strategy and Timeframe

- **Use of Siebel *e*Roadmap**—The project team implemented the Production Pilot in just seven weeks, from preliminary business analysis and storyboarding to deployment—one week ahead of schedule. A clear project scope and the use of standard Siebel *e*Business functionality made this possible.
- **Production Pilot**—The Phase I deployment included a small Production Pilot rolled out to ten field sales users in a single area.

Project Resources

- **Steering Committee**—The steering committee included the program manager and business managers from the 24 operating companies.
- **Customer Team**—The customer supplied the resources for the Production Pilot. These resources included:
  - A Project Manager working with the consulting project manager to ensure that project infrastructure (facilities, development environment, etc.) and customer resources were well managed
  - Two field sales people to provide business and process input and to validate the Siebel *e*Business solution
  - Six technical resources, including a database administrator to manage system interfaces, project infrastructure, and the adaptation of the customer's standard desktop environment to include the Siebel *e*Business Applications
- **Consulting Team**—The consulting team included five full-time resources—a Project Manager and four Siebel Systems consultants with competence in business analysis, configuration, Siebel Enterprise Integration Management (EIM), and reporting—and a Siebel Technical Account Manager (TAM). The TAM provided high-level, ongoing account support. Three Siebel Expert Services reviews included an audit of the system design, a configuration review, and a review of the interfacing approach.

Key Project Success Factors

- **Executive User Sponsorship**—Strong commitment from the customer organization, with visible support from the group president, program manager, and field sales personnel.
- **Clear Definition of Business Benefits**—Maintenance of a clear and mutually acceptable project scope, supported by early sign-off on the agreed solution and the customer's ability to differentiate between business requirements and unnecessary features.
- **Leverage of Siebel *e*Business Functionality**—Maximum use of standard Siebel *e*Business functionality, focusing on core areas of Siebel *e*Finance. The project team strongly challenged complex, nonstandard (customized) requirements during the business analysis stage. Early on, they recognized that integration with legacy systems required more attention than application changes.

Siebel Marketing—High Technology Industry

Business Objectives

Migrate multiple customer databases, including Telemagic, Lotus Notes, ACT!, and Excel spreadsheets, to Siebel *e*Business Applications:

- Enable inside sales and marketing personnel to exchange contact and lead information
- Provide customer information to field sales personnel

Organizational Structure

- **Users**—Approximately 135 users in the U.S. went live on Siebel *e*Business Applications, including representatives from various marketing, inside sales, and field sales organizations. In subsequent phases, the number will grow to more than 300 users, including additional users in the U.S., Canada, Latin America, Europe, and Australia.
- **Languages**—English.

Siebel *e*Business Functionality

This project team implemented the following basic Contact Manager modules: Accounts, Contacts, Calendar, Activities, and Opportunities. In addition to Siebel Marketing, subsequent releases will include the following Siebel Call Center modules: Service, Campaigns, CTI, Assignment Manager, and Database Replication.

Interfaces/Conversions

The conversion to Siebel *e*Business Applications involved a one-time load of all of the contact and account data from the disparate databases. One of the customer's systems engineers combined information from 25 ACT! databases, a Lotus Notes database, multiple Excel databases, and the Telemagic CRM legacy system. To avoid duplication and data loading problems, the company used the services of an outside mailing and marketing company to scrub and purge the data. Subsequent phases will include importation of rented lists, additional contact information, and nightly product information imports.

Project Implementation Strategy and Timeframe

- **Phased Approach**—The first phase strategy was to rapidly implement limited Siebel *e*Business functionality for key users in a compressed ten-week timeframe. Subsequent phases of the project will gradually introduce additional functionality and users.

- **Use of Siebel *e*Roadmap**—The ten-week project consisted of the following stages:
  - Discover Stage—two weeks
  - Design Stage—two weeks
  - Configure Stage—two weeks
  - Validate Stage—three weeks
  - Deploy Stage—one week

The project was completed on time.

Project Resources

- **Customer Team**—On the customer side, there was an executive sponsor, a Project Manager, a Siebel Systems administrator, a trainer, two user support team members, and designated lead users from the marketing and sales departments. The executive sponsor did not actively participate in the day-to-day issues, leaving this task to the Project Manager. The user team was very involved in the day-to-day issues, including scope and requirements, testing, and change management. Subsequent phases added additional consultants, MIS team members, and user representatives.
- **Consulting Team**—The first phase of the project had a staff of six consultants, including a Project Manager, a technical lead, a lead business analyst, a TAM, and two Siebel *e*Business trainers. Due to the limited staff, the technical lead and lead business analyst wore many hats, including project scoping, requirements gathering, design, configuration, system installation and setup, data mapping, unit testing, documentation, and rollout support.

Project Success Factors

- **Phased Implementation Approach**—Enabled each phase to have limited, achievable objectives.
- **Active End User Involvement**—Enabled quick turnaround of requirements, designs, and testing.

Siebel *e*Service—Finance Industry

Business Objectives

- Become a premier online support service for customers by providing accurate, timely, and consultative answers
- Increase customer loyalty and staff effectiveness by building a knowledge base for reference by support staff and customers

Organizational Structure

- **Users**—Phase I included 50–100 Siebel *e*Service users and ten Siebel Call Center users in the U.S. Phase II added users and functionality.
- **Languages**—English.

Siebel *e*Business Functionality

This project featured Siebel *e*Service with emphasis on solution search, service request management, and workflow management.

Interfaces/Conversions

- **Interfaces**—Interfaces included Lotus Notes Mail, CA Unicenter, the customer's Internet site, and the customer's login/password management system.
- **Conversions**—None.

Project Implementation Strategy and Timeframe

- **Phased Approach**—A phased approach focused on using standard Siebel *e*Service functionality, with minimum customization. The first phase was implemented in 11 weeks.
- **Production Pilot**—The project team first rolled out functionality to a small customer base, providing immediate benefits.

Project Resources

- **Steering Committee**—The steering committee included representatives from the company's business team and technology team, the Siebel Systems practice manager, and the Siebel Systems district manager.
- **Customer Team**—The customer provided the Project Manager and the technical liaison to the other groups within the company. The customer also managed user training.
- **Consulting Team**—The consulting team consisted of a Siebel Technical Account Manager (TAM), a lead configuration specialist, a lead architect, and a configurator. Siebel Expert Services provided design and implementation reviews and Internet integration support.

Key Project Success Factors

- **Executive User Sponsorship**—Effective executive sponsorship ensured that the project was completed on time with its goals achieved.
- **Clear Definition of Business Benefits**—Clearly defined business benefits supported effective internal marketing within the corporation. Users embraced the Siebel *e*Business solution enthusiastically.
- **Leveraging of Siebel *e*Business Functionality**—The project used standard Siebel *e*Business functionality wherever possible.
- **Phased Implementation Approach**—A clearly defined first phase enabled the project to roll out quickly and even deliver additional functionality such as email integration.

Siebel *e*Finance—Banking Industry

Business Objectives

- Give the commercial sales staff more information about accounts
- Enable cross-selling and up-selling of products and services
- Track customers and prospects more accurately
- Improve management decision-making
- Avoid duplication of efforts
- Develop better control of territory assignments

To ensure that the business objectives were met, the project team kept the user community and area representatives informed and involved in the process, while the consulting team helped the customer maximize standard Siebel *e*Business functionality. Management was involved in the design of procedures and the reporting and management views—configured to the company's specifications.

Organizational Structure

The project team used Siebel *e*Business Applications in a single division in a single state. The rollout included numerous offices/branches throughout the state. The team is planning global deployment as its next step.

- **Users**—The project included 310 users in one state.
- **Languages**—English.

Siebel *e*Business Functionality

The project team used Siebel Finance for Sales 99.5 (with optional Siebel Anywhere), Calendar, Sales Assistant, EIS, Business Relationship Management, and Call Reports applications.

Interfaces/Conversions

No legacy interfaces were built in the first phase. The project team converted data from several legacy systems (Act!, Excel, Word, and Access) to populate a central customer/prospect list. They also brought in Dun & Bradstreet data to supplement these data sources.

Project Implementation Strategy and Timeframe

- **Standard Implementation**—Since this implementation involved a single group of users with a common set of functionality, the project team chose an implementation that supported a simple sales process. The result was a rapid implementation that met the requirements.

- **Use of Siebel *e*Roadmap**—The overall project lasted about 14 weeks:
  - Discover and Design Stages—three weeks
  - Configure Stage—four weeks
  - Validate Stage—three weeks
  - Deploy Stage—four weeks

  A parallel training and rollout strategy accelerated deployment and acceptance.
- **Production Pilot**—A small Production Pilot was used with a very short timeframe to actual rollout.

Project Resources

- **Steering Committee**—The Steering Committee included several vice presidents and other executives from the banking division, including the primary project sponsor, the division president, and the executive vice president of sales.
- **Customer Team**—Two customer representatives were trained as Siebel application, system, and data administrators and assisted in design and development. A customer IT team handled production servers, infrastructure rollout, and logistics. Staff people performed data cleansing on the legacy application data.
- **Consulting Team**—The Consulting Team included a consultant who configured the screens; the Enterprise Implementation Manager, who did most of the testing; and a Siebel Technical Account Manager (TAM) who did analysis, design, project management, some configuration and testing, rollout work, and technical architecture work.

Key Project Success Factors

- **Aligning the Business and IT Organizations**—IT responded to the needs of the business and did an excellent job of building the supporting infrastructure and deploying it in conjunction with training.
- **Clear Definition of the Business Benefits**—The objectives defined at the beginning of the project were accomplished on time and within the budget.
- **Leveraging Siebel *e*Business Functionality**—The project made minimal changes to Siebel *e*Business standard functionality.
- **Active End User Involvement**—End users participated in requirements gathering sessions and user labs.
- **Phased Implementation Approach**—A clearly defined first phase enabled the project to achieve quick wins.
- **Clearly Defined End User Training Strategy**—Training was custom-developed for bank trainers, who then went on location at branches to train a group of users during a hardware/software connectivity rollout. Throughout the project, changes required a high level of authorization. This was vital to the project's success.

Siebel Sales Manufacturing Industry

Business Objective

Provide a system for sales, customer service, and key management staff in order to improve management of customers, activities, the sales pipeline, contacts, site visit reports, and customer agreements.

Organizational Structure

The company has 50 field sales representatives, 50 customer service representatives, and 20 corporate/marketing/division key staff. Each region has a field sales organization (sales directors, sales managers) and a factory-based customer service organization. Corporate management uses the system primarily to review consolidated information and reports.

- **Users**—The Phase I pilot has 22 users throughout Northern Europe. Phase I deployment is planned for 120 users worldwide, using a replicated environment for each business division. Later phases will include customer service order entry, forecasting/budgeting, and customer access to the system over the Web.
- **Languages**—Phase I uses English. Later phases will add local language support where necessary.

Siebel *e*Business Functionality

The company used the following Siebel Sales modules: Encyclopedia, Calendar, Charts and Reports, Executive Information System, Opportunities, Accounts, Contacts, Activities, Sales Methods, Competitors, Attachments, Siebel Remote, Assignment Manager, and Siebel Enterprise Integration Management (EIM). Except for the Sales Call Planning module, which was customized, the team implemented most of the system with standard Siebel Sales functionality.

Interfaces/Conversions

- **Interfaces**—To provide sales with updated information for customer meetings, each evening a batch EIM process transfers a "snapshot" of key information—pricing, stock, financial status, orders on hand, sales history, and budget information—from the AS/400-based back office system into Siebel Sales. Access to the Lotus Notes Competition Database is available from the Siebel Sales database.
- **Conversions**—None.

Project Implementation Strategy and Timeframe

- **Use of Siebel *e*Roadmap**—A 12-day project scoping study was completed to define and prioritize the requirements and develop a phased implementation plan. The first phase of the project lasted approximately 16 weeks:
  - Define Stage—one week
  - Discover Stage—two weeks
  - Design Stage—three weeks

  - Configure Stage—six weeks
  - Validate Stage—three weeks
  - Deploy Stage—one week.
- **Production Pilot**—The Production Pilot involved 22 pilot users. Additional business divisions were rolled out every three months.

Project Resources

- **Steering Committee**—The Steering Committee consisted of senior management representatives—the vice president of operations, the vice president of marketing, division presidents, an IT manager, and a project manager.
- **Extended User Team**—The team included representatives of each business area where the system was rolled out.

Joint Siebel/Customer Implementation Team

- **Customer Team**—The team included a customer Project Manager/Business Analyst and members of the IT department—system administration, DBA, and interface specialists.
- **Consulting Team**—The team included a Project Manager and three consultants (two configuration specialists and one interface specialist). An additional consultant provided report writing and other specialist skills. Siebel Expert Services performed sizing review, design review, configuration review, and an interfaces/production readiness site visit. A Siebel Technical Account Manager (TAM) provided ongoing support to the customer during the pilot operation.

Key Project Success Factors

- **Clear Definition of Business Requirements**—An initial project scoping study provided an excellent understanding of the business requirements and defined a phased approach for the implementation.
- **Executive User Sponsorship**—The vice president of sales and marketing (the executive sponsor) was directly involved throughout the project. The customer project manager represented the business and user requirements.
- **Active User Involvement**—The project team held regular reviews with user team representatives.
- **Phased Implementation Approach**—The Siebel Systems methodology achieved a high-quality implementation within a tight timeframe and budget.

Siebel Service—High Technology Industry

Business Objectives

- Create an intelligence and planning system to resolve problems and manage knowledge for the enterprise
- Provide a single tool for corrective action when problems occur
- Improve the timeliness of information
- Enable future integration with other systems at the parent company
- Provide a framework for information sharing among the business groups

Average customer response time was reduced by half. Turnaround time on problem resolution was reduced from 62 days to 30 days. Rapid identification and closure reduced or eliminated at least 35 percent of problems.

The reduction of customer problems requiring corrective action and failure analysis resulted in cost savings. The use of Siebel *e*Business Applications reduced the number of problems requiring a more expensive corrective action process from 70 percent to 30 percent.

Organizational Structure

The company is a global organization of approximately 2,500 people.

- **Users**—Phase I deployment includes about 500 users at the central site. The back-end HTML site will be rolled out to the entire organization.
- **Languages**—English in the United States, Scotland, and Japan.

Siebel *e*Business Functionality

The Siebel *e*Business functionality included Siebel Service in a Java thin client and Solaris environment. There was extensive use of Siebel Activities for audit information tracking and Siebel Workflow Manager for email notification purposes based on service request actions and assignments.

Interfaces/Conversions

- **Interfaces**—Interfaces enabled regular data entry of service requests into Siebel Systems via Web-based HTML and CGI-based data entry forms. This was accomplished via Siebel Enterprise Integration Management (EIM). Future implementations will enable integration with approximately 12 other internal systems.
- **Conversions**—None.

Project Implementation Strategy and Timeframe

- **Phased Approach**—Siebel *e*Business Applications were a key delivery component for this large global initiative within a large high technology organization. The project team is rolling out a customized Siebel *e*Business implementation in phases. The initial phase created a framework for sharing defect and quality-related information among the business groups, a capability the company will later extend to its suppliers and other external entities.
- **Use of Siebel *e*Roadmap**—The project team rolled out the project's first phase in five months using the Siebel *e*Roadmap methodology. In many cases, the team re-engineered or redefined business processes, an effort vital to the definition of future phases.

Project Resources

- **Steering Committee**—The Steering Committee included customer business managers representing various areas. The project sponsor, also a champion, communicated business-level decisions and requirements to the project team. Access to the user community and power users of the proposed system was limited to the Gap Analysis and User Review Labs stages, which included all champions and select users.
- **Customer Team**—The customer team consisted of four resources, including a full-time Project Manager to address the internal project deliverables. There were also three full-time technical resources for database administration, network administration, product configuration, and Siebel *e*Business project transition and knowledge transfer.
- **Consulting Team**—The consulting team included three full-time consultants, one part-time consultant, a Siebel Technical Account Manager (TAM), and Siebel Expert Services reviewers. The Project Manager managed the entire project team (including customer-provided resources) and the timely delivery of all project control entities (cost control, schedule management, etc.). The Project Manager also led the business analysis effort. The full-time consultants focused on business analysis, configuration, EIM, and documentation. The part-time consultant did the workflow applications. The TAM provided high-level technical competency in the Solaris product and ongoing account support. Siebel Expert Services analyzed the capacity, audited the system design, and reviewed the configuration.

Key Project Success Factors

- **Executive User Sponsorship**—Executive sponsorship fostered a dedicated team and timely access to resources.
- **Active User Involvement**—The user community responded quickly and effectively to team questions, ensuring an on-time project schedule.

Siebel *e*Service—Mobile Communications Industry

Business Objectives

Provide a robust, central, multilingual, multichannel contact and campaign management system to:

- Deliver functionality and infrastructure to provide a consistent level of service in the company's call center, taking into account current volume and future growth
- Serve as a pilot call center project for further global implementations
- Deliver the tools to support, in the short term, the relationship marketing activities of the organization within the European and African regions

Organizational Structure

- **Users**—Phase I deployment included 300 call center agents in Belgium and Germany. A team of ten people in the organization covered the marketing planning activities centrally. At the end of the first phase, plans call for another call center in a third country within EMEA.
- **Languages**—The starting base has 14 million members covering 11 countries and 17 languages in Europe and Africa. Customer names and addresses are listed in the local language. The first phase is limited to English and German.

Siebel *e*Business Functionality

The project implemented core Siebel *e*Service functionality as well as Siebel Workflow, Siebel CTI, SVB, Multilingual Threads, and Picklists. Reference data (Picklists) is in the local language and appears according to the caller's country. There were no mobile users or thin client users in this phase.

Interfaces/Conversions

- **Interfaces**—In the first phase, the interfaces were restricted to seven batches. These were refreshed daily from the corporate Web server, which was hosted by another party (so firewall considerations came into play). It also included an interface between Siebel Systems and the legacy marketing database.
- **Conversions**—The existing data consisted of 1.7 million Western European customer records. A third-party middleware product converted the business rules between the legacy and new systems. This worked well because the middleware product handled most of the interface APIs. A data quality exercise was undertaken by the business prior to the initial load to improve the quality of the data content.

Project Implementation Strategy and Timeframe

- **Phased Implementation Approach**—A phased approach contributed to the project's success. A scoping study prior to the initial project enabled the project team to understand the overall picture and manage expectations. The business objectives helped prioritize the rollout of functions. The project team implemented core Siebel Call Center functionality and business critical interfaces in the first phase.
- **Use of Siebel *e*Roadmap**—The first phase of the project took six months. The Siebel *e*Roadmap played a key role in keeping the project on time and on budget.

Project Resources

- **Customer Team**—The Customer Project Team included eight team members consisting of two customer Project Managers, two Business Analysts, a Call Center Analyst, two Integration Testers, and a Project Administrator.
- **Consulting Team**—At the resource peak (during configuration and start of testing), 20 consultants worked on the project. They included a Project Manager, a Business Analyst, four configurators, a CTI expert, a report writer, five individuals working on interfaces, a middleware expert, four consultants assisting in the system test, and a technical architect. A Siebel Technical Account Manager (TAM) and Siebel Expert Services Consultants participated in key stages of the project.

Key Project Success Factors

- **Clear Definition of Business Requirements**—A project control document clearly stated the business requirements as well as the roles and responsibilities of each team member.
- **Leverage of Siebel *e*Business Functionality**—A key to success was ensuring a common approach to the project with buy-in from all three parties (integrator, customer organization, and call center agency). The project team employed standard Siebel *e*Business functionality.
- **Active User Involvement**—The organization's dedicated business owners ensured an early buy-in from users.

Siebel Sales—Pharmaceuticals Industry

Business Objectives

- Replace the current sales force automation system with an eBusiness solution that is easier to use and maintain
- Manage sales representatives' physician calls and sample drops efficiently

Organizational Structure

The sales organization consisted of more than 800 field sales representatives, with a district manager for every ten sales representatives. A 20-person Sales Operations Team administered the sales force application on behalf of the sales representatives.

- **Users**—The Phase I implementation included 800 users in the U.S.
- **Languages**—English.

Siebel *e*Business Functionality

This Siebel *e*Pharma project implemented functionality to maintain Professionals, Activities, Calendar, Samples, and Call Planning information. It also used sophisticated reporting in Actuate to support the needs of its four major drug franchise lines, showing the primary, secondary, and tertiary call-and-sample penetration statistics that senior management uses to prepare drug launches and promotions.

Interfaces/Conversions

This project included fairly complex interfaces and conversions. The conversions included a one-time interface to a legacy system and two ongoing data loads. Interfaces included ongoing bi-directional interfaces to 1) a samples database, 2) a marketing campaign database, and 3) the data warehouse.

Project Implementation Strategy and Timeframe

- **Phased Approach**—The team used a phased approach for implementation. Phase I went live in seven months with an eight-week Production Pilot. Then the team rolled out the Siebel *e*Business solution to support the needs of an 800-person field sales force.
- **SiebelNet**—The customer used SiebelNet Business Services, an outsourcing service for hosting and administration of Siebel *e*Business Applications.
- **Production Pilot**—The customer chose a representative set of users from the overall user population for its Production Pilot, improving the quality of the application.

Project Resources

- **Customer Team**—The customer dedicated an IT Project Manager to work directly with the integrator Project Manager. In addition, two individuals supported Siebel *e*Business Applications implementation and data administration, and another served as a dedicated IT resource to cleanse the legacy application data.
- **Consulting Team**—The project team included six full-time consulting resources, a part-time Siebel Technical Account Manager (TAM), and Siebel Expert Services reviews. Full-time resources included a Project Manager, a Technical Architect, three configurators, and a resource to assist with the conversions and interfaces. Siebel Expert Services addressed issues of scalability, functionality, and upgrade path.

Key Project Success Factors

- **Leveraging Siebel *e*Business Functionality**—The use of standard Siebel *e*Business functionality enabled a quick implementation with high user acceptance.
- **Clearly Defined User Training Strategy**—Training ensured end user acceptance of the new system.

Siebel Call Center—Financial Services Industry

Business Objectives

- Support sales initiatives and customer service for end customers by providing a direct touchpoint for customers
- Replace existing lead system with a Planner Portal to assist with lead generation, lead allocation and notification, financial planners' action management, reporting, and charting
- Provide channel partners (Independent Financial Advisors) with the ability to generate and manage valid quotes via the Internet, then print them locally

Organizational Structure

- **Users**—50 Siebel Call Center users; 1,600 Planner Portal users (the Portal can scale to accommodate 3,000 users/financial advisors).
- **Languages**—English.

Siebel *e*Business Functionality

The project implemented Siebel Call Center, including Contacts, Campaigns, Fulfillment, Opportunities, and Activities. Data was managed using Workflow, Assignment Manager, Communications Manager, eScript, and Active Directory Service (ADS). Lead management (Opportunities) was implemented on multiple channels including email and fax. Leads were allocated using Assignment Manager, and Financial Planners were notified using Workflow and Communications Server (fax and e-mail).

Interfaces/Conversions

- **Interfaces**—The system receives Opportunities generated from an external system on an hourly basis. These were loaded into Siebel Call Center using Siebel *e*AI. Campaign lists were loaded as required directly into the Contacts Table using Siebel *e*AI.
- **Conversions**—The existing data, consisting of 30,000 customer records, was reviewed and scrubbed for data quality prior to the initial load.

Project Implementation Strategy and Timeframe

- **Phased Approach**—The implementation used a phased approach with a scoping study completed during the bid phase. The project team was able to implement Siebel Call Center functionality and lead management across multiple channels during the first phase.
- **Use of Siebel *e*Roadmap**—Three projects were run in parallel and implemented in four months. The Siebel *e*Roadmap played a key role in keeping the project on time and on budget.

Project Resources

- **Customer Project Team**—The customer provided a business sponsor, a program manager, two customer Project Managers, five Business Analysts, a Project Administrator, two Architects, four configurators, and a rollout team of three.
- **Consulting Team**—At the resource peak (during configuration and start of testing), 21 consultants worked on the project. They included an engagement manager, two Project Managers, one lead configurator, four Business Analysts, eight configurators, one .COM expert, a report writer, a test manager, and two Architects.

Key Project Success Factors

- **Use of Siebel *e*Roadmap**—Resulted in clear scope definition, well-documented deliverables, and faster acceptance.
- **Clear Definition of Business Benefits**—Enabled all three of the projects to be simultaneously and successfully implemented on the same day.
- **Active User Involvement**—Ensured a highly cohesive team and a cooperative work environment.

Siebel Call Center—High Technology Industry

Business Objectives

- Quickly implement an outsourced customer care call center solution to enable agents to provide superior service support to clients' end consumers
- Allow all call center agents to be trained on a single application to support all clients
- Implement a multichannel eBusiness solution that provides agents with a single view of every customer
- Improve client satisfaction by providing fully integrated customer care services
- Increase agent confidence, efficiency, and job satisfaction

Organizational Structure

- **Users**—Phase I: 20 connected and five remote internal eReps. Phase II: Planned deployment of Siebel *e*Mail Response to 620 users.
- **Languages**—English.

Siebel *e*Business Functionality

The project implemented core Siebel Call Center functionality including Account, Contact, and Activity Management as well as Reports and Charts to track agent activity.

Interfaces/Conversions

- **Interfaces**—Siebel VB-COM interface between Net Agent and Siebel Call Center.
- **Conversions**—Transactional, chat-based customer data is loaded from Net Agent into the Siebel database via the Siebel VB-COM program, enabling the customer's eReps to toggle between the applications and view the complete customer history.

Project Implementation Strategy and Timeframe

- **Phased Implementation Approach**—A phased approach ensured rapid ROI on specific implementation objectives. Phase I deployed Siebel Call Center and integrated email and chat data using Siebel VB-COM. Phase II will include Siebel *e*Mail Response deployed to the entire user community.
- **Project Duration**—Siebel Call Center was implemented during Phase I in less than eight weeks.

Project Resources

- **Customer Project Team**—The customer provided a VP of operations, a director of application development, an IT director (branding and ASP channel), a director of services, an application architect, a manager of eBusiness solutions, and a CRM analyst/developer.
- **Consulting Team**—The consulting and implementation team consisted of a Project Manager, four consultants (including a Siebel Call Center expert), a trainer, a Siebel Technical Account Manager (TAM), an architecture consultant, a configuration specialist for the Visual Basic review, a configuration specialist for the configuration review, a configuration specialist for the sizing review, and a senior architecture specialist.

Key Project Success Factors

- **Clear Definition of Business Benefits**—Before the project began, consulting team members carefully mapped the relevance of the Siebel *e*Business solution to the customer's business model.
- **Phased Implementation Approach**—A clearly defined first phase enabled the project to achieve quick wins and strong user adoption.
- **Executive User Sponsorship**—The customer's management team actively supported the implementation in both project scope and business requirements.
- **Active End User Involvement**—The end users of the system were deeply involved in defining work rules and the user interface.

Siebel Call Center—Public Sector

Business Objectives

- Implement a multichannel call center solution to support interactions between the department and its constituents, increase organizational and operational efficiency, and enhance financial performance
- Create a customer-focused eBusiness system that provided a holistic view of each taxpayer to all personnel in the department
- Increase the level of service delivered to constituents
- Eliminate the islands of information resulting from disparate existing legacy systems
- Reduce expenses and fraud
- Decrease employee turnover and enhance training

Organizational Structure

- **Users**—Phase I deployed Siebel Call Center to approximately 100 inbound customer service representatives. Plans are to deploy to an additional 700 users.
- **Languages**—English.

Siebel *e*Business Functionality

The project implemented core Siebel Call Center functionality and included CTI, Workflow, Assignment Manager, Reports, EIS, SmartScript, .COM Server, Remote Client and Tools modules, as well as the Siebel *e*Service application. The system runs on a Compaq NT server, and the database is Oracle 8.1.5 running on an HP-UX server. In Phase I, Siebel Call Center was integrated with Genesys CTI technology, Rockwell IVR system, Filenet, AMS Advantage Revenue, and AMS CACS for Government.

Interfaces/Conversions

Interfaces and conversions will be conducted when the department's Advantage Revenue (vertical industry application software) program implementation is completed.

Project Implementation Strategy and Timeframe

- **Phased Implementation Approach**—A phased approach is being utilized to ensure rapid ROI on specific objectives of the implementation. Phase I focused on implementing and deploying Siebel Call Center to 100 inbound customer service representatives. One of the primary objectives of this phase was to prepare the department for an anticipated rise in call volume due to legislative revisions. Phase II of the project is focused on making more detailed constituent information available within Siebel Call Center. Phase III will involve rolling out Siebel Call Center to the department's 100 collections agents. Later phases will turn Siebel Call Center into a complete conduit to all constituent information stored in the department's back office systems.
- **Project Duration**—Siebel Call Center was implemented during Phase I in less than six months.

Project Resources

Technical personnel, business executives, and end users from the department. The consulting and implementation team consisted of Technical Consultants; Project Managers/Business Analysts; and Configuration, Architecture, and Design Experts.

Key Project Success Factors

- **Active End User Involvement**—To ensure end user buy-in and delivery of a system that would meet their needs, a large number of department end users were involved in the project from its initial planning stage.
- **Phased Implementation Approach**—A clearly defined first phase enabled the project to achieve quick wins.

Siebel *e*Insurance—Insurance Industry

Business Objectives

- Establish a call center to sell a new stakeholder pensions product per U.K. legislative changes for the April 2001 tax year
- Provide a single view of the customer for selling group and individual stakeholder pension products
- Deliver a consistent, multichannel presales and sales experience to customers
- Improve employee productivity via consistent business processes in the contact center

Organizational Structure

- **Users**—Phase I supports 70 call center representatives based in the U.K.
- **Languages**—English.

Siebel *e*Business Functionality

The project, architected around Compaq NT4 Application Servers and an Oracle 8.1.6 Database Server, focused on deploying out-of-the-box Siebel *e*Insurance functionality to meet the customer's aggressive implementation timeframe. A key corporate objective was delivery over a thin client architecture to minimize desktop footprint and IS maintenance overhead. The implementation included deployment of Accounts, Contacts, Calendar, Opportunities, Activities/Activity Plan, Service Request, List Management, Attachments, Assignment Manager, Workflow, and Siebel Enterprise Integration Management (EIM).

Interfaces/Conversions

- **Interfaces**—Overnight batch load of incremental changes to sales data (from Leapfrog Contracts System) using EIM.
- **Conversions**—An initial conversion of historical customer data from an in-house customer contact management system into the Siebel *e*Business application.

Project Implementation Strategy and Timeframe

- **Phased Implementation Approach**—Phase I provided a Siebel *e*Insurance-based managed solution to enable provision of stakeholder pensions. Subsequent phases will support a larger number of call center representatives and enable a greater focus on high-net worth individuals.
- **Use of Siebel *e*Roadmap**—The project consisted of the following stages:
  - Define, Discover, and Design Stages—six weeks
  - Configure and Validate Stages—eleven weeks
  - Deploy Stage—two weeks

Project Resources

- **Customer Team**—A commercial manager, a Project Manager, a Technical Project Manager, a Lead Developer, a Technical Architect, a Network Administrator, and a Database Administrator.
- **Consulting Team**—A practice manager, a Siebel Technical Account Manager (TAM), a lead consultant, a sizing review expert, an architecture design workshop expert, a CTI reviewer, a configuration design review expert, an EIM mapping review expert, a production readiness review expert, and an architecture expert who provided regular, onsite guidance.

Key Project Success Factors

- **Phased Implementation Approach**—Adherence to the Siebel *e*Roadmap methodology ensured that the aggressive implementation timeframe was met and that tangible, measurable results were achieved as soon as the project was in production.
- **Active End User Involvement**—Siebel Call Center representatives were actively involved in defining business requirements and system design/deliverables.
- **Leverage of Siebel *e*Business Functionality**—The customer's strong desire to use standard Siebel *e*Insurance functionality allowed the implementation team to easily map the functionality to the customer's business processes.

Siebel Interactive Selling Applications—Communications Industry

Business Objectives

De-commission the company's current Web configurator and create a single Web-based order experience for dealers and distributors by developing a stand-alone configurator:

- Provide the foundation for rolling out future product lines to dealers and distributors
- Create the ability to save and restore configurations, to email a link to a stored configuration, and to save configurations in template form
- Provide per-click feedback and coaching to users during the configuration process
- Decrease the overall time to configure a system and increase configuration platform stability
- Provide a more convenient path for existing customers to upgrade or migrate their existing systems with client-manufactured components

Organizational Structure

- **Users**—Phase I deployment included approximately 3,000 users of the Business Partner Web Configurator.
- **Languages**—English.

Siebel *e*Business Functionality

Standard Siebel Interactive Selling Server functionality was used to store and retrieve configurations and to provide email links to configurations. Additionally, linkage to LDAP authentication was created, scripts were written for purging the database, and the ability to save a configuration as a template was created. Standard Siebel *e*Configurator functionality was employed to model the products and to provide selling messages. Additionally, four custom reports were created, an export function was written, and a custom "optimization" algorithm was created.

For Phase I, the Siebel Interactive Selling surveyor was installed to capture click stream data to an external database. In future phases, a reporting and analysis tool to review the data collected from the site will be implemented.

Interfaces/Conversions

- **Interfaces**—For Phase I, interfaces were written to provide email functionality, to link the application to the existing business partner web portal, and to provide user authentication.
- **Conversions**—For Phase I, programs were written to extract the product master data out of SAP in order to build the Siebel *e*Configurator data model.

Implementation Strategy

- **Phased Implementation Approach**—A phased implementation approach was agreed upon at the outset of the project. This phased approach will allow users to gain valuable experience by using live Siebel Interactive Selling products, provide a basis for future releases, and deliver rapid ROI. Phase I created the foundation for a single Web-based order experience for dealers and distributors. Phase II will deliver custom reporting functionality. Phase III will center on increasing Siebel Interactive Selling surveyor functionality and implementing an additional high-end, more complex order entry system.
- **Project Duration**—The first phase of data model development took four months. Subsequent product release, maintenance, re-testing, and more customized reporting functionality took two additional months.

Project Resources

- **Customer Team**—The customer project team consisted of an executive sponsor, a Project Manager, a business owner, six developers, and two testers. During the initial stages, there was also significant involvement from various other business and technical stakeholders.
- **Consulting Team**—The Siebel Systems team consisted of one Project Manager, one senior consultant, one consultant, and one senior architecture specialist.

Key Project Success Factors

- **Executive User Sponsorship**—At the outset of the project, business and technical stakeholders participated in a series of workshops to develop scope, timeline, and functionality requirements. Presence of both business and technical personnel allowed trade-offs to be made and consensus to be achieved rapidly.
- **Phased Implementation Approach**—By agreeing to a phased rollout of product lines, a smaller team was quickly able to design and develop a manageable set of business rules. The team will be able to leverage this expertise in future releases with new product lines. Leveraging the Siebel *e*Roadmap implementation methodology kept the project running smoothly and mitigated deployment risks.

Siebel Field Service—Pharmaceuticals Industry

Business Objectives

Deploy an integrated call tracking system for a wide variety of disparate functional groups within the company:

- Integrate non-connected systems supporting the company's technical services, instrument services, customer services, sales, and other functional groups
- Increase the efficiency of information access
- Improve customer satisfaction and aid in customer retention
- Employ change management assistance to ensure adoption across all user groups

Organizational Structure

- **Users**—Phase I deployed Siebel Field Service to connected and remote technical and instrument services users; Phase II and Phase III will implement Siebel Call Center and Siebel Sales to customer service personnel and the company's sales and field sales staff.
- **Languages**—English.

Siebel *e*Business Functionality

Standard Siebel Field Service functionality—with some customization—was implemented for the company's domestic operations. The application, which ties together all customer-facing groups and is linked to its ERP and legacy systems, enables the company to track customer inquiries and assets, ensures consistency of customer data across all groups, and allows it to present a single, integrated face to its customers.

Interfaces/Conversions

- **Interfaces**—As the MANMAN ERP system used by the company has limited update capabilities, all asset, product, and order data is transferred nightly to the Siebel Field Service application through Siebel Enterprise Integration Management (EIM).
- **Conversions**—None.

Implementation Strategy

- **Phased Implementation Approach**—Phase I included the following steps:
  - Created interface between Siebel Field Service with legacy and ERP systems
  - Replaced custom-built applications for complaint and service management
  - Replaced service use of a customer-built contact management application
- **Project Duration**—Phase I of the implementation—from the Define Stage through rollout—took three months.

Project Resources

- **Customer Team**—The customer project team consisted of an IS director; customer service director; IS Project Manager; customer service/sales project manager; technical service manager; instrument service manager; customer service manager; sales business analyst; two IS developers; and members of the technical service, instrument service, and customer service teams.
- **Consulting Team**—The Siebel Systems team consisted of a senior consultant, principal consultant, Siebel Technical Account Manager (TAM), several product specialists, and several members of the Siebel End User Education and Siebel Technical Education groups.

Key Project Success Factors

- Clear definition of business requirements
- Executive user sponsorship
- Active end user involvement
- Strong end user training
- Leverage of Siebel *e*Business functionality
- Phased implementation approach

Appendix B—Supporting Documentation

Impact of Additional or Optional Functionality

The Siebel *e*Business functionality usually implemented in the first phase of a project is very comprehensive and includes the core functionality of each Siebel *e*Business application. This functionality addresses the requirements of the majority of first-phase implementations. In unique situations, the company needs additional functionality to address the business requirements, making the initial implementation more complex. In such cases, timeframes and resources need to be adjusted accordingly. The following situations affect the timeframe and/or the number of resources required for a successful project.

Requirements not Defined

The definition of requirements can add two to three weeks to the project during the Discover Stage (exclusive of business process re-engineering). In this situation, Siebel Global Services recommends an additional business analyst.

Complex Interface to ERP Systems

Complex interfaces can add two or more weeks to the project timeline. Siebel Global Services recommends a part-time resource.

Interfacing with Existing Logic Outside of Siebel eBusiness Applications

Interfacing with existing logic can add one to four weeks to the project, depending on the integration compatibility (for example, insurance companies often interface with existing insurance calculators). This time estimate excludes the additional work required on the external systems to provide interface support. There is no impact on the resource requirements.

Implementing Siebel Quotes

Implementing Siebel Quotes depends on the gap between the company's current quote system and Siebel Quotes functionality. Implementing Siebel Quotes can add two to six weeks to the project, depending on how closely the customer wants to emulate its existing quote system. Siebel Global Services recommends an additional person well versed in Siebel Quotes.

Siebel Sales-related Options	Additional Resources	Timeline (weeks)
Siebel CTI	1	8
Siebel Forecasting	1	6
Siebel Order Entry	1	6
Siebel Proposals and Siebel Presentations	1	6
Siebel Quotes	1	6
Siebel Target Account Selling	1	2

Diagram 10: This table shows how adding functionality will extend time and resource benchmarks for Siebel Sales.

Implementing Siebel eConfigurator

The time needed to implement Siebel *e*Configurator depends on the number of product configuration combinations. It also depends on how well the business understands the relationships between its products and services. Once the project team has clearly defined business rules, the configuration can take as little as one day or as much as several weeks, depending on the complexity of the rules. Siebel Global Services recommends an additional person well versed in Siebel *e*Configurator.

Additional Reports

The time needed to create new reports is based on the number of people trained in Siebel Reports. To reduce the timeline, the company can add more Siebel Reports experts. Fewer people are needed if time is not a factor.

Data Cleansing and Conversion

The effort required to extract and cleanse data from the legacy systems depends on the sources and the "cleanliness" of the data being converted. Before converting data, the project team should conduct a detailed review with the user community to determine the value of cleansing and converting the data. While it is critical to convert data valuable to users, there is no value in converting data that will not be used.

Appendix C—Aligning the Business and IT Organizations

Misalignment of the business organization and the IT organization typically results in an inability to deliver the necessary functionality in a timely manner. Resolving this issue must be addressed differently in centralized and decentralized organizations.

The Business Organization

In a centralized business organization, the processes its users and managers follow are consistent, regardless of location, language, or other factors. Various parts of the organization may provide input on the definition of the process, but the result is a single set of processes that applies to all users. In a decentralized model, subsets of the user organization define their own processes, or modify a set of processes created centrally. Some limited information may be reported centrally (as required by centralized management or the reporting team), but each business group typically derives this data in a different way. The most simple and most accurate way to identify a company's model is to interview users in multiple parts of the company and compare their business processes.

The IT Organization

The measure of centralization in a company's IT organization is based on the development and deployment structure for applications. In a centralized IT organization, a single team deploys applications across the user organization. This team may be in one area or geographically dispersed, but it should follow a single schedule for application implementation. In a decentralized model, separate implementation teams support different user organizations. Information sharing from team to team may or may not occur.

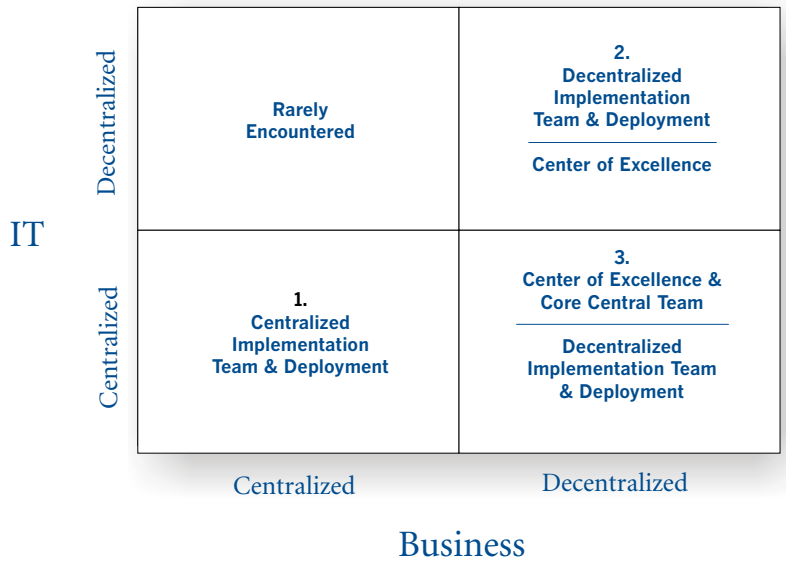

Diagram 11. How to properly align business and IT organizations, depending on the structures in place.

Centralized Business/Centralized IT

This model is the simplest to support. A centralized IT team works with the corresponding centralized business leads to support a single consolidated deployment. The recommended approach creates one data model and one configuration, with users segmented according to responsibilities.

Decentralized Business/Decentralized IT

In this model, implementation teams arise in the decentralized IT organization to support their corresponding business units. The key to a successful implementation here is to establish a Center of Excellence (COE) at a global level. This ensures—where there are similarities across implementations—the sharing of information, work experience, and lessons learned across the multiple teams. The COE ensures that a minimal set of standards is applied during implementation to support the consolidation of data across the organization. The recommended approach is to use multiple, separate development environments, with sharing of specific components (generally driven through the COE) using Siebel Tools.

Decentralized Business/Centralized IT

This is the most complex model to support. The danger is in delivering the least common denominator of functionality, which meets the needs of no one and is not responsive across many business units. Another danger is in attempting to use the application as the driving force to install new common processes across the decentralized business units. If a company is to use centralized business processes, these processes should be rolled out first, followed by the use of the application to reinforce and automate the process.

In this model, the organization should create a core development team consisting of members responsible for the core data model, the business components, and the common features used across a majority of business units. Then create separate IT teams, aligned with the business units, to take the development work done by the core team and add specific business unit features and functionality.

For this approach, Siebel Global Services recommends a COE to ensure the appropriate distribution of work to the core team and the business unit-focused IT teams. Such a center can ensure that lessons learned across the distributed teams are shared with other teams and that company-wide reporting requirements are achieved.

In this environment, the core team develops the core repository and provides it as a basis for work for each distributed development team. The distributed teams each work on their own repositories (sharing objects as needed across teams using Siebel Tools archive files) and take new releases from the core team using the repository merge functions in Siebel Tools. Siebel Engineering uses this model to develop Siebel Industry Applications that leverage engineering work from the horizontal applications.

www.siebel.com

World Headquarters
Siebel Systems, Inc.
2207 Bridgepointe Parkway
San Mateo, CA 94404
United States
Tel: 800-647-4300
Tel: 650-295-5000
Fax: 650-295-5111

Asia Pacific
Siebel Systems Australia
Level 1, 80 Pacific Highway
North Sydney, NSW 2060
Australia
Tel: +61-2-9012-3100
Fax: +61-2-9012-3333

Latin America
Av. Nações Unidas, 12.901
20 andar - Torre Norte
04578-903 - São Paulo - SP
Brazil
Tel: +55 11 5110 0500
Fax: +55 11 5110 0666

Europe
Siebel Systems UK Limited
Siebel Centre
The Glanty
Egham, Surrey TW20 9DW
United Kingdom
Tel: +44-0-1784-494900
Fax: +44-0-1784-494901

Japan
Siebel Systems Japan K.K.
Ebisu Prime Square
1-1-39 Hiroo, Shibuya-Ku,
Tokyo 150-0012 Japan
Tel: +81-3-5464-7700
Fax: +81-3-5464-7702

10P10-WP370-05620 (10/01)