RELAVIS
eBusinessStreams™

Relavis eBusinessStreams and IBM WebSphere

The Foundation for Collaborative CRM

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IBM Business Partner

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Abstract

Organizations committed to implementing Customer Relationship Management (CRM) strategies and related technology solutions are becoming increasingly aware of the importance of collaboration to their success. They are realizing that communication and collaboration are critical to establishing, developing and sustaining successful relationships between employees, customers, business partners and suppliers.

Interest in collaboration has caught the attention of the CRM industry as well, as evidenced by the growing amount of press coverage and analyst attention. CRM technology vendors too, are mounting major efforts to quickly incorporate collaborative capabilities in their solutions.

Most of the discussion about collaboration to date has been limited to sharing data between systems, e-mail discussion threads and Web access. From a users' standpoint, the emphasis has been on leveraging information to help close current sales opportunities and resolving customer service issues.

These are important, but they are only part of the collaborative story. Relavis Corporation, through its long history with IBM, has applied its experience and insight into developing the full capabilities of collaboration within CRM through people, process and technology.

The purpose of this paper therefore, is to outline what collaborative CRM is, identify the technical requirements for a collaborative CRM system, and describe how together, Relavis eBusinessStreams and IBM middleware (WebSphere® and DB2®) address these requirements.

CRM and Collaboration

CRM Defined

> "Customer Relationship Management (CRM) is nothing if it does not involve collaboration between customers and sellers. Competitive differentiation comes from extending CRM to the broader enterprise across all channels, segments, LOB's [lines of business] and product classes."
> – *Meta Group*

There is no doubt that collaborative CRM is among the hottest topics in business today, but what kind of collaboration are we talking about? How does collaboration support effective CRM strategies?

We start by defining CRM simply as a business strategy for acquiring customers, with subsequent attention to increasing retention, loyalty and share of their business.

Within this definition are some underlying assumptions:

- *Successful CRM Initiatives Are Focused.* Companies know who their most profitable customers are and the future customers they want to attract. By selectively choosing which customers to serve (instead of trying to be all things to all customers), successful CRM initiatives make the best use of limited resources – particularly important for SMB organizations.

- *Successful CRM Initiatives Enhance Relationships.* Although we commonly use the term Customer Relationship *Management,* implying that customer behavior can be controlled (which, as much as we would like, cannot be done), the real intent is customer relationship *development:* making relationships fuller, bigger and better.

- *All Relationships Are Important.* While customers are the visible focus of CRM, every relationship in the business chain – employees, business partners, suppliers and others – is critical to the CRM initiative's success.

Collaboration Defined

Companies and customers *collaborate* when they invest in their relationships by working together toward a mutual benefit they could not otherwise achieve on their own.

As companies learn to meet their customers' increasingly complex needs, they are realizing too, that the exchange of information is just the starting point to collaboration. Real "work" has to be performed by the recipients and more often than not, successful completion of this work requires other people, information, processes and technologies. Collaboration therefore, is all about getting work done – together!

Technology and Collaboration: An effective collaborative process requires sophisticated tools. CRM solutions must be built on a collaborative framework that manages the complex interaction between people, processes and technology.

For these tools to be effective however, people must be motivated to use them. They must be convinced that using the technology is worth their time and will make their work easier. This means for example, offering better ways of finding the right information when it is needed, making it easier to identify and communicate with the right people with answers and expertise on any given topic, and bringing resolution to each task with speed and accuracy.

The CRM Environment

CRM – The Front End of the eBusiness Value Chain

Organizations committed to a CRM strategy need continuous, unfettered access to customer information, clear lines of communication for collaboration, and seamless execution of business processes.

Typically, the flow of customer information and activities moves through three major points of organizational contact – the sales, marketing and customer service departments. Many companies are unable to freely share information and efficiently execute business processes between these departments because customer information and support systems have historically been developed independently of one another.

As organizations implement CRM, the legacy of these barriers impacts all users:

- Customers find it increasingly difficult to work with companies. In today's world of greater choice and electronic access, the bonds of customer loyalty are stretched to their limit.

- Internally, users are frustrated because they cannot access the right information needed to make timely decisions, collaborate, and ultimately, achieve corporate CRM objectives. These barriers also add considerable cost, complexity and risk to the success of the CRM initiative.

- Problems faced by internal users are compounded as business partners and suppliers are brought into the process.

To alleviate these problems, CRM applications should serve as the access point within an eBusiness Value Chain connecting disparate information, processes and systems for employees, customers, business partners and suppliers.

As illustrated, IBM's industry-leading Software Strategy for eBusiness creates an integrated business system infrastructure that seamlessly connects CRM application users to ERP, product, supply chain and other back end information and systems.
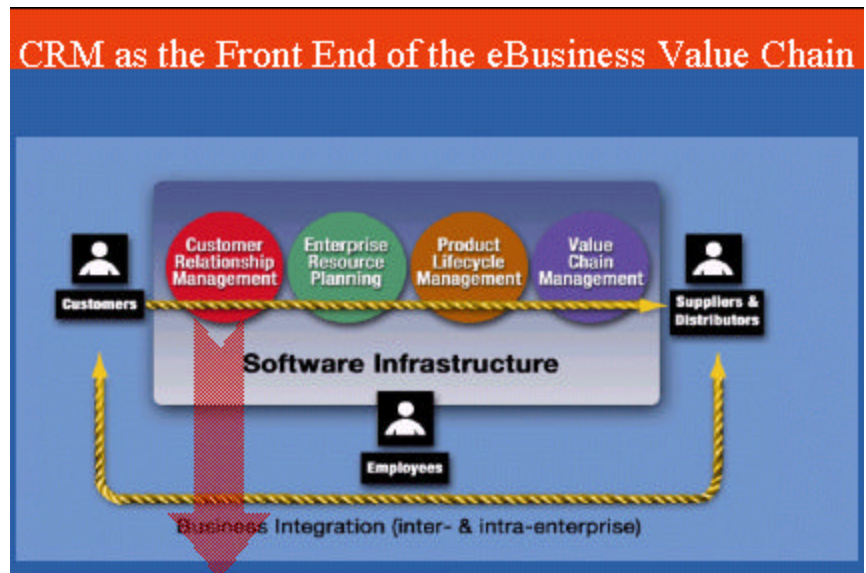
CRM and eBusiness System Requirements

The eBusiness Value Chain also implies that information is stored in and shared across multiple internal and external systems and networks. Unfortunately, all of these systems are likely based on heterogeneous standards. To further complicate matters, users need to access this information through multiple devices.

An eBusiness infrastructure for CRM activities must support collaboration, open standards (J2EE), and workflow.
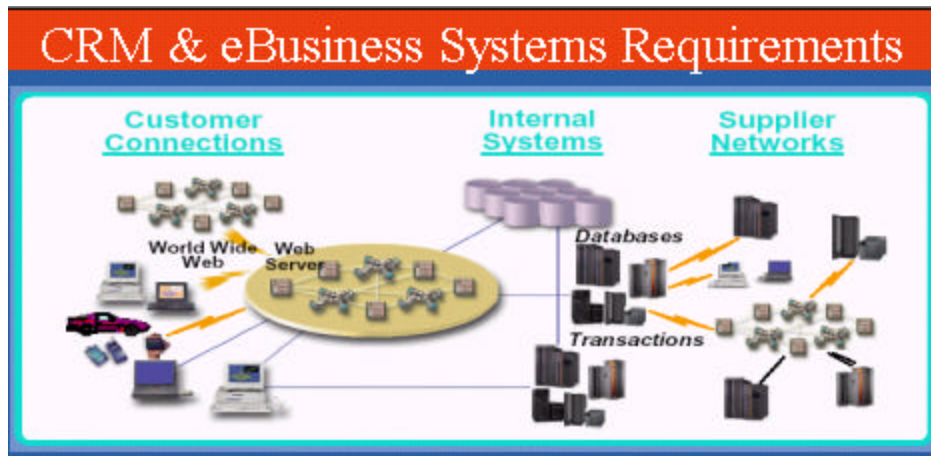
Collaborative CRM - Putting it All Together

> "Thus far, the hallmark of collaborative CRM has been the user going to a place to collaborate with others. We strongly believe that collaboration will become less of a place than a capability to interact from within any context." – *David Marshak, Seybold, February 2002*

Most collaborative CRM efforts to date have been limited to system-to-system sharing of transactional data that support immediate sales opportunities or service issues, or messaging systems with content that is not integrated within the context of each customer relationship.

Collaborative CRM integrates the way people, information, business processes and technology work together to accomplish the activities that will achieve the business strategy's objectives and goals.

Collaborative CRM...

- Supports both structured and unstructured information for people and systems, and presents it within the context of each business issue.
- Accommodates the needs of all users in how their work must get done (business practices), using the tools that work best for them (technology). This includes web and groupware technologies, business process re-engineering, business rules, workflow and messaging.

Collaborative CRM addresses both the immediate and long-term needs of the business strategy. After all, short-term activities determine your current income; how you approach customer relationships will determine your future.

As the illustration shows, collaboration occurs between people in many different ways. They accomplish their work through a variety of vehicles – hardware devices, Web sites, workflow, messaging and scheduling – using data drawn from different systems. Collaborative CRM is the unifying application that brings all the participants – customers, employees, business partners and suppliers – together, so they can accomplish their work in the way that suits them best.

Collaborative CRM Connects all the Pieces

Devices

Web Sites

Workflow

Customers

Messaging

Partners

Collaborative CRM

Suppliers

Scheduling

Employees

Systems/Data

Relavis eBusinessStreams: A Sound Foundation with IBM Technology

Solution Overview

Relavis eBusinessStreams is a set of collaborative CRM solutions that meet the needs of Sales, Customer Service, and Marketing organizations. It enables employees, customers and third parties, business partners, and suppliers to engage in collaborative value-add processes, sharing structured and unstructured information across all touch points and interaction channels. As a collaborative CRM solution, it manages the convergence of business opportunities and experience.

eBusinessStreams embraces open Internet standards and takes full advantage of IBM's industry-leading Software Strategy for e-business. Relavis solutions are scalable, run on multiple platforms and operating systems including Linux, are optimized for IBM's ∧ servers and easily extend to the Web and other e-commerce applications. Implementations can be quick and seamlessly maintained.

With Relavis eBusinessStreams, you can manage customer relationships through any channel of interaction. And because it is built on IBM's industry leading Software Strategy for e-business, IBM DB2, WebSphere and IBM's ∧ family of servers, you get an open system Internet-based collaborative CRM application that is scalable, reliable, and able to manage information across your entire enterprise.

Relavis eBusinessStreams is designed for organizations needing to…

- Integrate information from multiple, diverse systems (front and back office) within their CRM processes and applications.
    - Our pure J2EE architecture means that vendors do not dictate proprietary interfaces for application integration. Instead, each company can use open standards to best manage integration in a way that is appropriate for them.

        As a result, integrating Relavis eBusinessStreams with other systems and data is quick and efficient.

- Show improvements in sales revenue, customer loyalty and market share
- Lower total cost of ownership (TCO) by leveraging current IT investments and resources
    - Faster implantations are more cost effective and generate rapid return on investment
    - Our incremental implementation approach minimizes risk while helping organizations achieve their strategic objectives and goals
- Leverage open systems and standards (J2EE, Java, Web and zero client) that provide the flexibility required for changing business conditions and processes
- Ramp up quickly and achieve high user adoption rates based on familiarity with the Web
- Enhance customer and business relationships using the Web through self-service, chat and application sharing

The Relavis Collaborative Framework

The eBusiness Value Chain illustrated how access and use of customer information requires the support of many systems – not just the CRM system. In order for organizations and customers to collaborate effectively, the sales, marketing and customer service functions and the underlying technology supporting them must collaborate as well.

The CRM system must be able to integrate information and processes with other related systems such as the Web, ERP, financial, inventory, business intelligence and others. The CRM system serves as a user interaction hub for these other systems and technologies. The combination of these technologies and open architectural standards offers a collaborative framework that enables the *entire collaborative process*, not just data and transactions, to work.

Relavis eBusinessStreams' collaborative framework supports and integrates each of the cornerstones of the collaborative process – people, information, business processes and technology – creating a capability for dynamic interaction.

People

Relavis' collaborative framework makes it possible for people to get their work done wherever they happen to be. Through the use of browsers, chat capabilities, whiteboarding, mobile support, wireless access and PDAs, users have access to the information they need and can execute the business processes that accomplish their work.

Information

Our collaborative framework enables the free and unfettered flow of information, bringing it to the right people, at the right place, and at the right time, regardless of its form or location. As the illustration shows, there is tight integration between the Web Server (IBM e business infrastructure), multiple data stores and various user devices.

Business Processes

Our workflow management capabilities enable both people and systems to efficiently execute collaborative business processes. Rules defining and governing these processes are flexible and easily administered.

Technology

Relavis' collaborative framework is based on an open, industry standard-based architecture (J2EE, XML, Java). This enables efficient integration with other systems while running on all major platforms, including all of IBM's ∧   Series, Sun Microsystems, and Microsoft.

Relavis' collaborative capabilities are ready for the technologies of today (chat, CTI, e-mail and text analysis) and the future. Any new collaborative tools and devices that adhere to open industry standards can 'plug and play' into Relavis eBusinessStreams.
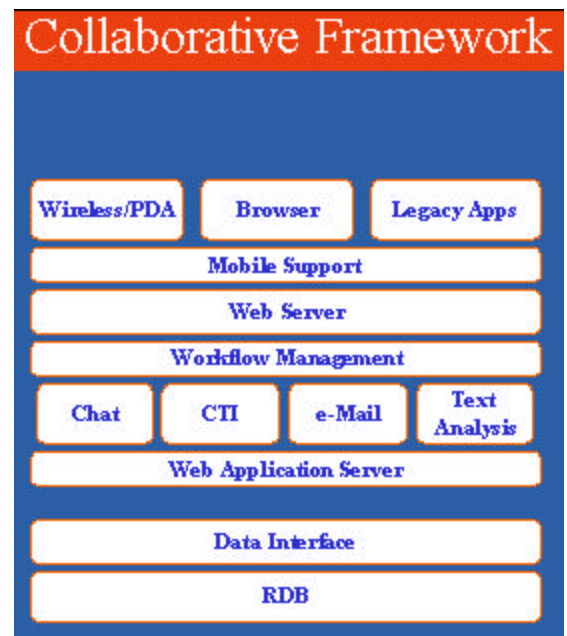
For IT departments, the framework provides minimal disruption to existing systems while complementing existing IT strategies, thus leveraging and protecting current infrastructure investments.

The framework's flexibility enables companies to follow an incremental approach to CRM implementations, making it possible to increase the likelihood of success, control costs, and achieve ROI objectives and goals.

IBM's WebSphere and Relavis eBusinessStreams

IBM's WebSphere platform makes it easy for companies to implement applications and business processes, such as CRM, as well as integrate existing processes with the Web. Relavis believes that IBM's commitment to using all open standards is critical to providing the flexible and cost-effective collaborative CRM framework that companies are looking for.

IBM's WebSphere Architecture

IBM's WebSphere family of products provides the infrastructure software for dynamic e-business, and is the most comprehensive and fastest growing e-business platform on the market. Dynamic e-business with WebSphere delivers customer value in three crucial areas:

Enhancing Customer Loyalty

A key factor in building customer loyalty is providing users with a more personalized Web experience. This depends on personalizing the experience for each user, extending that experience to any device, and enable commerce transactions.

WebSphere enhances customer loyalty by delivering users a much richer experience. It provides streamlined access to customized content to any user or device. With WebSphere you can build portals so that users, partners and employees readily find what they need in a highly interactive and personal way. You can provide wireless access to your systems to reach new markets with WebSphere's pervasive, voice and translation offerings. You can conduct e-commerce to reach a global market quickly and cost effectively. And you have performance and personalization abilities to ensure that users don't have to wait or search for relevant information.

Inspiring customer loyalty and continuously developing relationships is not just a matter of what you do, but how you do it. Relavis eBusinessStreams makes it easier for your company's entire relationship chain to do business with you by leveraging WebSphere's foundational capabilities in all its modules.

Integration and Process Automation for Improved Business Agility

Businesses are striving to integrate and automate their business processes to become more agile and effective, removing excess time and costs from their supply chain. The business world is a mixture of IT systems, and the challenge is to integrate these valuable assets, not abandon them.

WebSphere integrates and automates business processes to maximize an organization's agility. WebSphere leads the industry in integration technology.

IBM's WebSphere delivers an e-business framework that accelerates business processes across the entire application portfolio of the enterprise. It allows you to run the business the way you want: innovating brand new processes dynamically, connecting at will to your suppliers and customers, and treating them as individuals. With IT systems adjusting to the speed of your business ideas, and business people in control of value chain processes, you slash cycle time and costs for a rapid ROI.

As a collaborative CRM application built for WebSphere, Relavis eBusinessStreams is the unifying component that delivers both the business value and ROI companies demand today, and the flexibility to quickly respond to tomorrow's opportunities and challenges.

A Reliable, Scalable and Flexible Architecture for Dynamic e-Business

WebSphere empowers users to build, deploy, and grow e-business applications. The WebSphere Application Server is the powerhouse of the platform. It assures scalability, speed and performance for any level of e-business demand.

Building on this solid foundation, WebSphere provides rapid application development tools to shorten costly development cycles, reuse your existing systems, and capitalize on your developers' skills. WebSphere tools make development highly productive for every member of the team across the development life cycle. IBM leads the industry in open standards adoption, giving the highest level of interoperability and flexibility to WebSphere e-businesses.

Relavis eBusinessStreams fully leverages WebSphere's capabilities so that companies can quickly and economically make CRM a dynamic component of their e-Business strategy.

IBM's DB2 and eBusinessStreams

As the foundation for e-business, DB2 product family software is the industry's first multi-platform multimedia, Web-ready relational database management system, strong enough to meet the demands of large corporations and flexible enough to serve medium-sized and small e-businesses. The award winning DB2 product family software together with Internet technology makes information easily accessible, available, and secure. More than 60 million DB2 users from over 300,000 companies worldwide rely on IBM data management solutions.

Reduced risk

- IBM provides rock solid infrastructure for Relavis eBusinessStreams
- Tried, tested, proven with Relavis eBusinessStreams
- Scaleable to grow with your business needs
- Extensible from laptop to mainframe
- Relavis eBusinessStreams developed on IBM middleware and servers

Faster deployment

- Advanced analytics and functions to complement Relavis eBusinessStreams
- Pre-built templates and data models
- Thoroughly integrated and tested with Relavis eBusinessStreams

Greater ROI

- Lower total cost of ownership

Relavis eBusinessStreams Architecture

Relavis eBusinessStreams leverages WebSphere, DB2 Relational Database, Genesys CTI, WebSphere Business Component Text Analyzer and wireless technologies. By aligning the Relavis architecture with IBM, customers are assured of having the industry's most comprehensive, flexible, customizable and open platform available.

Relavis eBusinessStreams provides a modular approach to manage, and deploy a collaborative CRM solution with support for sales, customer service and support and marketing processes. The three-tier process-driven architecture facilitates true extensibility and scalability that can easily share information with other applications.

Coupled with a powerful set of tools that separate the development of business logic from application logic, Relavis eBusinessStreams constitutes a comprehensive environment for the development and deployment of a complete collaborative CRM solution.

Data Layer

The data layer manages all CRM-related and other data stores. The business logic is completely separated from the application code using a Data Access Object. This makes it easy to "plug and play' different data stores.

Standard interfaces manage interactions with all other systems in the eBusiness Value Chain, such as ERP, legacy systems, and others.

Presentation Layer

The presentation layer uses a thin-client interface where all user functionality is exposed. The architecture is device independent and uses only HTML code.

Users can work either connected or disconnected. Replication services will let you work offline by storing all changes until you are ready to connect with the server.

Information can be accessed as well as made available to any legacy applications.
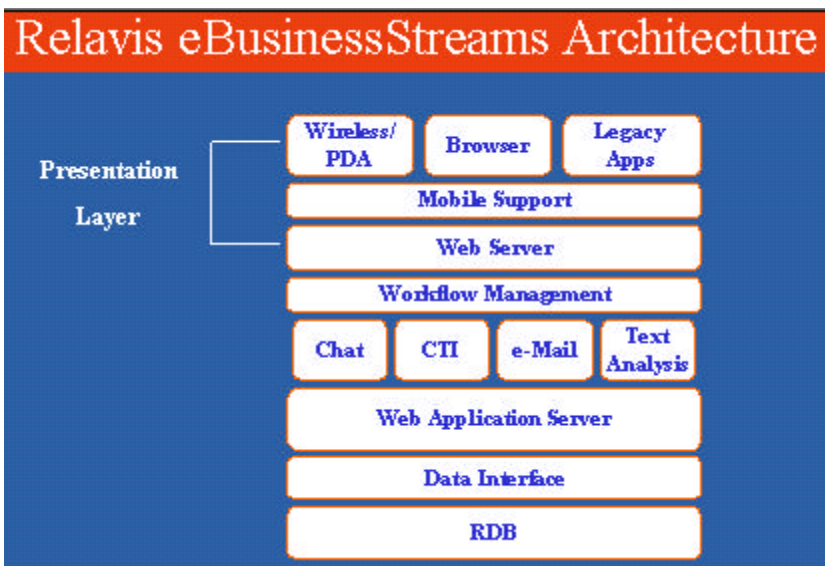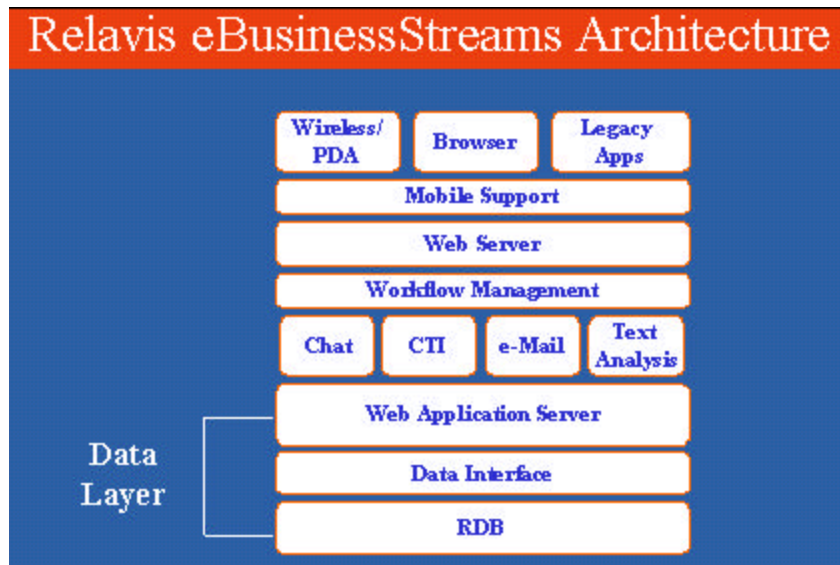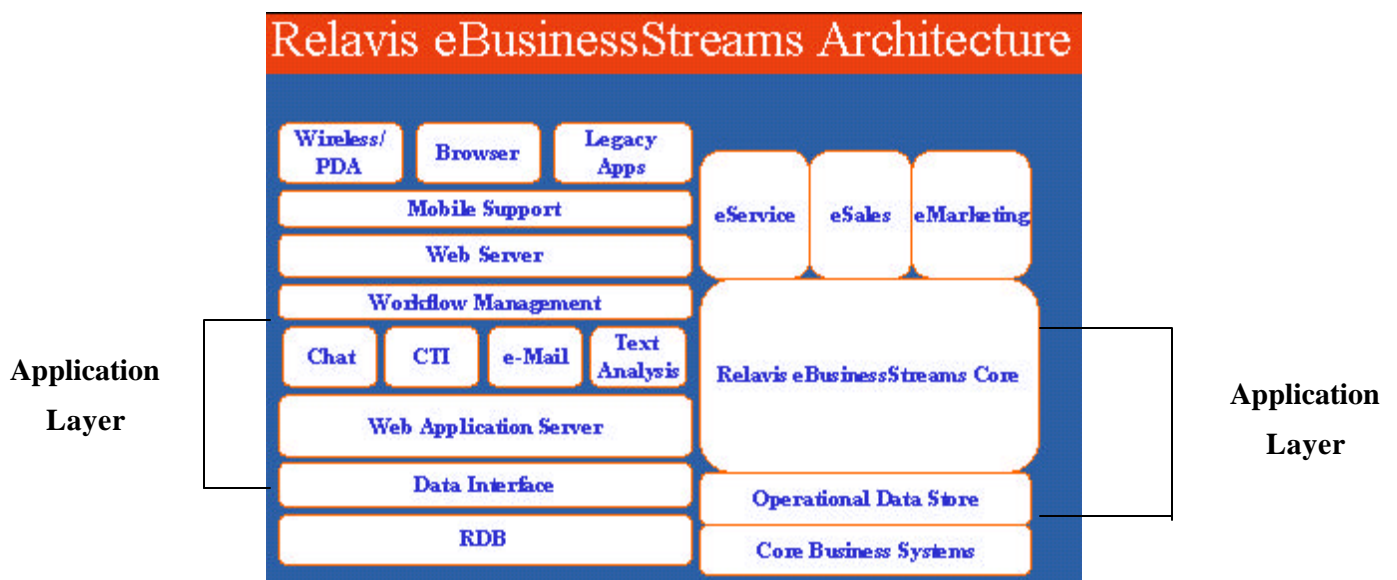
Application Layer

The Relavis eBusinessStreams Core manages all business application logic, workflow, security, data access logic and all shared functionality between each of the modules – sales, customer service and marketing.

Collaboration is managed through the integration of workflow and all points of communication.

Using a graphical interface, business owners and managers can configure all the workflow, business rules and processes necessary to support their organization without any programming.

Application Layer

Application Layer

Relavis eBusinessStreams for WebSphere Deployment Architecture

Relavis eBusinessStreams fully leverages the open standard J2EE architecture to build a collaborative framework around the WebSphere Application Server.
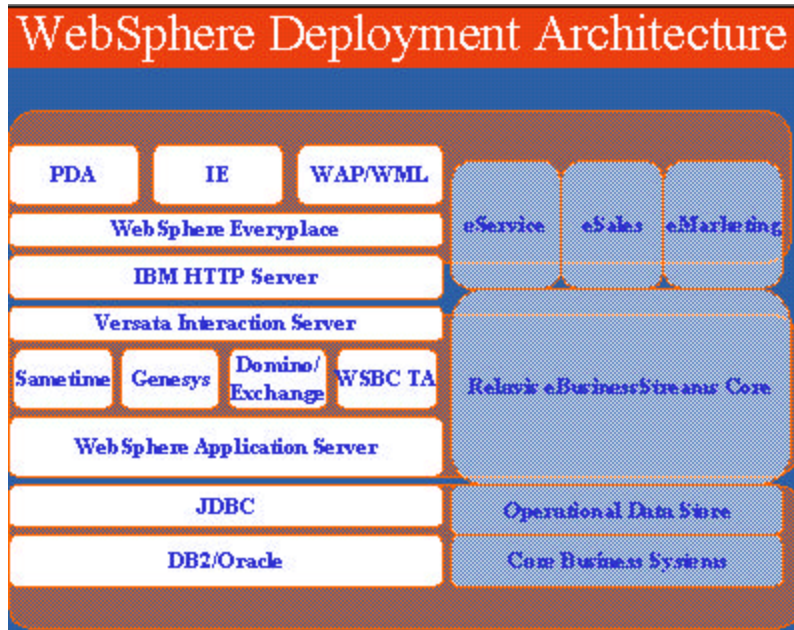
Relavis eBusinessStreams incorporates the following technologies:

- Connected and disconnected support for users with either browsers or PDAs. WebSphere Everyplace provides connectivity for both wireless and PDA connections. Replication for disconnected users is supported via DB2 Everyplace.
- The IBM/HTTP Server provides called pages to the user via the Relavis interface.
- The Versata Interaction Server controls all workflow processes.
- Sametime provides chat, collaboration meeting and application sharing services.
- Genesys T-Server provides computer telephony integration (CTI), linking telephone systems with application and data services.
- E-Mail support for either Lotus Domino or Microsoft Exchange
- WebSphere Business Components Text Analyzer (WSBC TA) enables automatic categorization of any inbound text-based service request.
- MQSeries® can be used for connectivity between business solutions, legacy systems and other corporate information systems
- WebSphere Studio for Application Development tools are used for Relavis eBusinessStreams customization
- Relavis eBusinessStreams is currently certified to run either IBM DB2 or Oracle databases.

Relavis eService for WebSphere

Overview

The Relavis eService application module is designed to meet the needs of organizations wanting to improve their direct customer service. Support teams can use it to record, act upon, and resolve customer requests arriving through any of a number of communication channels, including conventional mail, e-mail, telephone calls, Web site visits, interactive messaging tools, and face-to-face interactions at service outlets. Relavis eService addresses the comprehensive needs of customer contact centers from first level support all the way up through management and customer self-service.

Customer service and support function draws upon a multitude of diverse systems that need to be integrated and leveraged for maximum operating efficiency and benefit to the customer. Relavis eService for WebSphere is based on an enterprise-level architecture that fully leverages all the benefits available through the span of J2EE technologies. Organizations can provide the full set of corporate resources to their customer-facing staff, who are delivering value back to their customers.

Relavis eService was built from the ground up as a J2EE web application, and architected so that all features and functions fully leverage the industry's best web standards and practices. Relavis eService handles all contact center functions such as problem resolution, escalation, self-service, subscriptions, entitlement and comprehensive workflow capabilities. As a contact center it provides a single communications queue, efficiently routes and processes all customer contacts, regardless of communications channel used – telephone, e-mail, fax or chat – with speed and consistency.
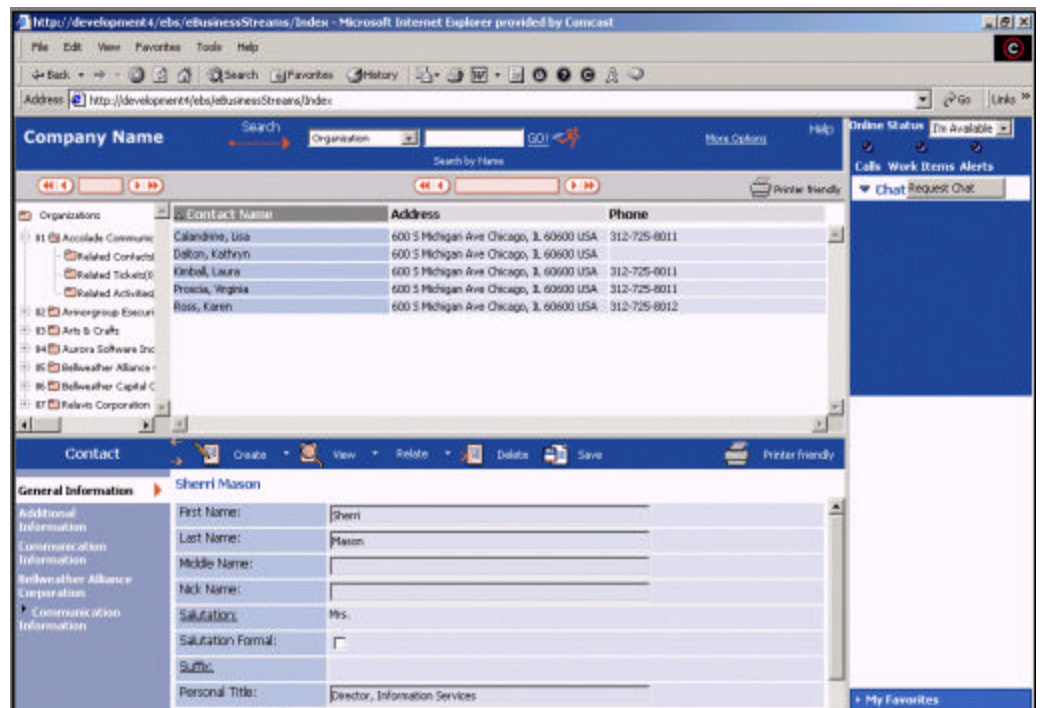
Relavis eBusinessStreams' J2EE architecture enables easy integration with various other customer-related systems, providing customer-facing staff with an up-to-date composite view of all customer information. For example, order management, shipping, billing, and purchase history can all be easily made available to the user at the moment it is needed.

Each user has the tools needed to get their job done based upon configurable roles. User role definitions drive the screens and data displayed, and the processes they are involved in. The pure browser-based thin client enables rapid user deployment. Administrators can quickly and easily configure each user's role, and provide them system access with a URL, an ID and a password. Real time chat and intelligent searches provide each user access to corporate knowledge and resources when they need it.

The familiar Web-based user interface lets users quickly become proficient with the system.

Relavis eService focuses on Customer Contact Management including Problem Resolution, Customer

Self-Service, Workflow and Escalation, Querying, Reporting and Analysis, Chat and Text Analysis.

Relavis eService uses 'tickets,' which are containers for managing each discrete customer interaction (e.g., phone calls, e-mails) and all their subordinate problems, issues and requests. Each of these items is resolved independently, and the ticket is closed out only when all the underlying issues have been resolved.

Scripts and questionnaires rapidly identify the source of customer problems and customer Service Agents. The Relavis eService knowledge base helps agents resolve issues correctly the first time, minimizing the need for escalation. As problems are resolved, information is automatically updated in the problem category in the system's knowledge base.
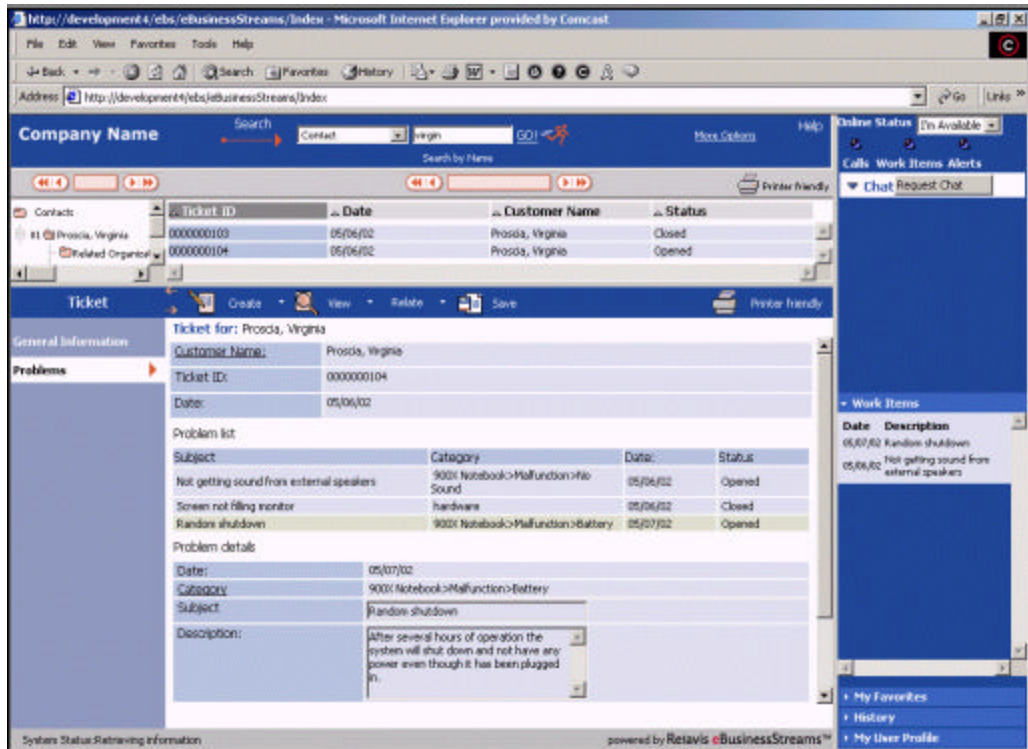
Relavis eService Communications Management

A centralized communications queue ensures that all customer interactions, regardless of medium (telephone, fax, e-mail, web) are handled using pre-configured and flexible collaborative and workflow/routing rules. This assures consistency of service quality across all customer touch points.
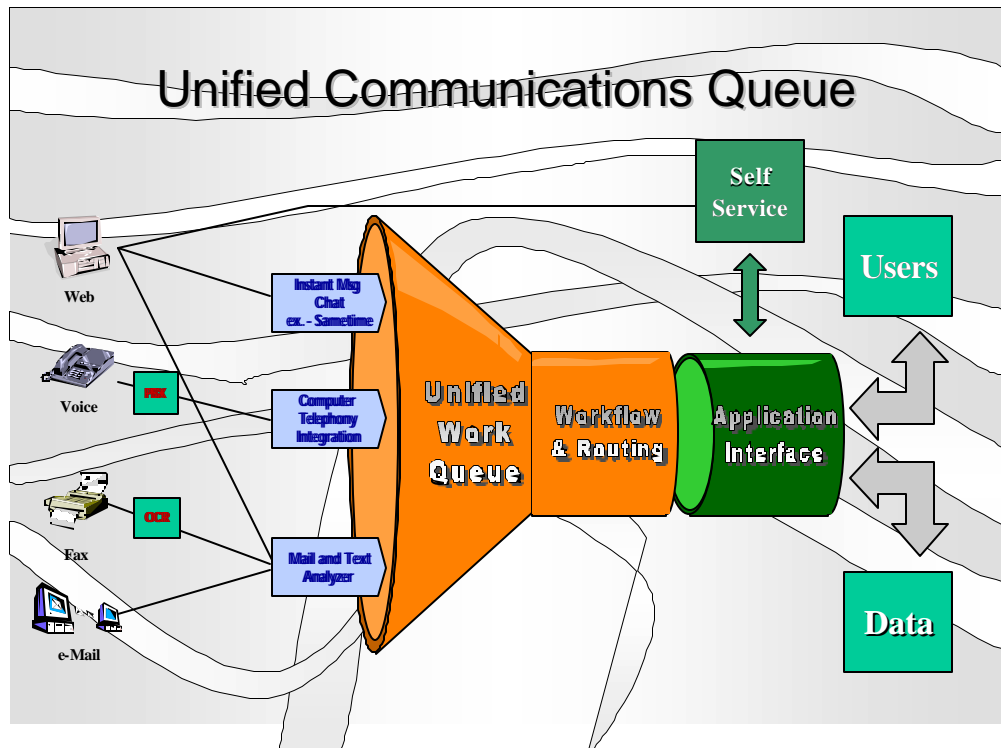
Managing E-Mail-Based Customer Service Requests

A major concern for call center managers today is how to efficiently and accurately handle the rapidly growing volumes of e-mail oriented service requests. Managing this channel has direct and significant consequences for call center costs and profitability, as well as overall customer satisfaction and loyalty. Consider these statistics:

- Based on a survey of contact center managers, Datamonitor, Inc. says it is possible that e-mail received by contact centers may increase as much as 1000% by 2003 from 1999 levels. Datamonitor found that a more probable estimate is for 720% growth, with the percentage of customers using e-mail to contact companies rising to 18% in 2003 from 5% in 1999. Overall contacts are expected to increase to such a degree that double the current number of agents will be required by 2003. *(Datamonitor, Inc., April 6, 2000).*

- Jupiter Media Metrix reports that only 38% of U.S. companies resolve e-mail inquiries within six hours, and 33% are taking three days or longer to do so, or are not responding at all. The percentage of companies not responding at all (24%) increased from 19% in the prior quarter. On a positive note, over half of all inquiries are responded to within 24 hours. *(Jupiter Media Metrix, June 1, 2001).*

- Online service is getting worse. Of 250 automotive, business-to-business, financial, health, music, packaged-goods, retail, and travel Web sites Jupiter surveyed between November 23 and December 10, 2001, only 30% responded to and resolved customer inquiries within the six-hour window in which a majority of shoppers say they expect a reply. Although 90% of shoppers say they'd be satisfied with a response within two days, one-third of the 75 retailers surveyed couldn't respond that quickly. The overall response rates--even among non-retail sites--slipped 10% from a survey conducted in August 2001. 90% of the sites have phone-routing software for handling customer calls, but only 43% have e-mail automation technology. *(Jupiter Media Metrix, January, 2002).*

Relavis eService uses the WebSphere Business Components Text Analyzer (WSBC TA) to help fully integrate e-mail-based customer service requests into the overall call center operation. The Text Analyzer intelligently categorizes messages and routes them to the appropriate customer service agent – according to their defined skill set – for processing and resolution.

Text Analyzer Highlights

- Text Analyzer is the most accurate categorization engine in the market.

- It is simple to use: It has a simple set of APIs for you to build your "killer" application. It is also simple to put into production because you can set up the document categories easily, and once started, you can add categories easily without requiring expert assistance.

- Text Analyzer is unique in the number of languages it can process, it can categorize double-byte character languages, such as Chinese, Japanese, and Arabic.

- Text Analyzer is fast: The system can be trained in minutes to generate analysis rules. Document sorting can handle 20-40 messages per second, which adds up to millions of e-mails per day.

- It is unique in being able to return multiple categories with different confidence levels enabling a richer set of routing choices.

Text Analyzer Benefits to Relavis eService Users

- Call centers get quick and sustained relief from potentially over-burdening volumes of customer e-mail requests.
- Achieve lower costs and improved efficiency through rapid and accurate routing of requests to the appropriate resource
- Promotes rapid and accurate responses to customers that increase their satisfaction and loyalty.

Relavis
Relavis Corporation

Using Relavis eService to Manage and Resolve Client Issues

A client requests assistance by placing a phone call or starting an online chat

A client reports a problem by sending e-mail or creating a ticket in the eService self-service interface

Relavis eService processes the request and assigns it to the appropriate agent

eService identifies the client

eService cannot identify the client

The agent sees the client's information and creates a ticket

The agent uses Search feature to create a ticket

eService creates a ticket that the agent accesses from his or her Workbench

The agent uses information from the client and the ticket features to detail the problem and corresponding resolution

Agent can resolve the issue

Agent cannot resolve the issue

The agent uses the Problem Determination and Solving features to identify a solution

The agent escalates the ticket that follows a pre-defined escalation path to someone who can identify a solution

Review board members examine the resolution

The client receives the resolution from the agent while eService publishes the resolution in the Subscription Information tab of the eService self-service interface

Relavis eService Configuration and Administrative Capabilities

Relavis eService provides tools that make it easier for call center management to adapt to rapidly changing business needs and conditions, without the need to divert busy internal IT staff, or hire expensive outside consultants.

Configuration and administrative capabilities address the full needs of call center managers including:

- User management
- Keywords and reference data
- Problem categories
- Review process

- Duplicate management
- Questionnaires
- Escalation/Routing
- Logging

Questionnaires and Escalation routing are built using an intuitive graphical workflow interface.

Logical branching allows you to build sophisticated scripts and business process.

For each step, you can define the question, answer type and possible answers.
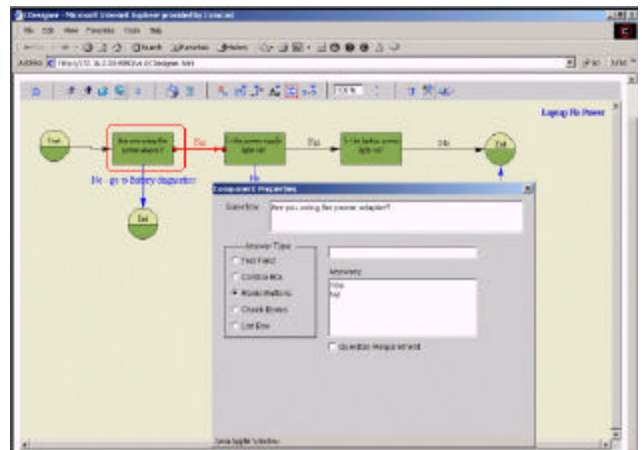
At the end of the questionnaire, you can modify the problem category, initiate a new process, assign processes to users, or open a new search.

Relavis eService lets you set up duplicate checking criteria against contacts, organizations and processes. A simple interface makes it easy to resolve and duplicates.

A logging section enables you to easily search for and view activity against specific criteria.
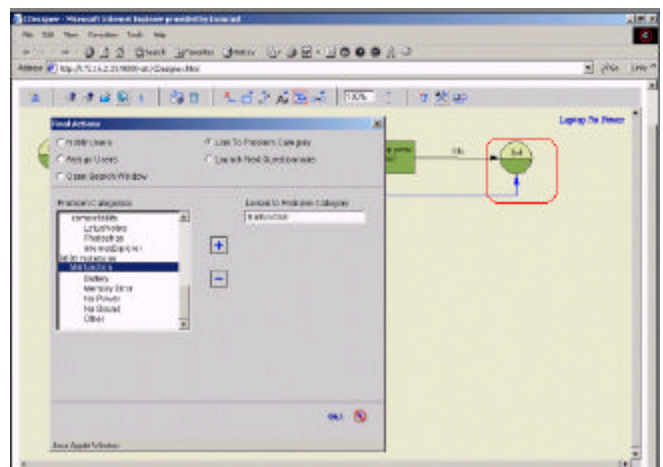
The Relavis – IBM Partnership

Collaborative Successes

SMB Customer: Milwaukee Electric Tool

Milwaukee Electric Tool (Milwaukee) sells heavy duty, portable electric tools to professional tool users throughout the world. Its field sales organization sells to large retailers like Home Depot and industrial supply houses like W.W. Grainger, while an internal telesales organization, called Lightning Direct, services smaller accounts.

With increasing sales to its loyal customer base, Milwaukee's sales force was finding it extremely difficult managing all the details required to provide the high level of customer service the company prided itself on delivering.

"We were under pressure to implement an automated CRM solution," explained Dennis Pfeil, Milwaukee's Director of Information Services. Milwaukee evaluated more than 10 CRM applications against its business requirements and unanimously selected Relavis eSales.

According to Cindy Thoenes, Milwaukee's Business Systems Manager, "Using the Quick Start program, a rapid implementation service from Relavis, Lightning Direct was up and using eSales in only five days! We were very pleased. Because we decided to use eSales pretty much out-of-the-box, Relavis quickly configured the software to address our needs, saving time and money."

In addition, the technology platform deployed has been critical to the success achieved to date. Without the collaborative functionality provided by the IBM framework, Milwaukee would not have been able to achieve their goals. Collaborative applications, such as eSales, were quickly and easily deployed on top of the existing infrastructure, including e-mail. In the long run, the IBM framework enables extending this core technology into other customer centric communication channels, such as Milwaukee's WebSphere-based e-Commerce and Partner Support site.

Business Partner: Sky Solutions (Saddle Brook, New Jersey)

Sky Solutions, an IBM Premier Business Partner and Certified for e-Business, is an e-business integration firm serving midsize to large businesses in multiple sectors.

The company wanted to offer its clients a CRM solution and related services that would add significant value while protecting their existing infrastructure investments. After investigating other CRM products and vendors, Sky Solutions chose to partner with Relavis Corporation because of their shared commitment to delivering both high-end solutions and customer satisfaction.

According to Shachar Malemed, Sky Solutions' Director of Business Solutions, "Relavis meets our diverse selection criteria. We want to offer our customers a proven, collaborative CRM solution that is technically robust, and will build on the strength of IBM's e-Business framework. It is important that the solution meet the needs of our mid-market customers through quick implementation and effective scalability. And from our standpoint, we want to partner with a company that is financially strong, committed to its channel partners, and professional in its approach. Relavis Corporation has proven to us that they are the right partner."

Conclusion

CRM is about creating and implementing business strategies that let you focus on the customers you wish to serve today and tomorrow. Developing all the key internal and external relationships in your strategic business chain to their maximum potential therefore, is imperative.

Collaboration is a critical component to relationship development. How well prepared and equipped you are to collaborate will go a long way to determining your overall CRM success.

Not all collaborations are created equal. CRM systems sharing data and processing transactions are but one part of the collaborative process. Collaborative CRM systems leverage the people, information, processes and technology needed to close sales, resolve customer issues and develop profitable relationships for the future.

Collaborative CRM solutions therefore, must be built on a technical framework that can flexibly respond to rapidly changing business and technology conditions easily, effectively and economically.

IBM's WebSphere Software family provides this framework by offering the most compelling e-business platform on the market today. WebSphere's architecture is reliable, highly scalable, comprehensive and flexible. Whether you operate an SMB or enterprise-level business, WebSphere's use of open standards protects and extends your current IT infrastructure investment, while providing a clear and affordable path to future growth.

Relavis eBusinessStreams, with its sales, marketing and customer service modules, is built for collaborative CRM from the ground up. It optimizes the flexibility, completeness and robustness of the IBM WebSphere platform.

Together, Relavis eBusinessStreams and IBM WebSphere uniquely provide the foundation for collaborative CRM by creating "the capability to interact from within any context."

The Benefits of Relavis eBusinessStreams for WebSphere

What can Relavis eBusinessStreams for WebSphere do for your company?

Increase ROI/Lower Total Cost of Ownership

- Leverage your existing IT investments
- Improve execution of business processes
- Improve staff productivity and retention

Example: Relavis eBusinessStreams runs on your existing systems, easily integrates with your e-mail system, and uses industry standards architecture to quickly integrate with your back end systems; ERP, legacy, and/or other databases.

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The Benefits of Relavis eBusinessStreams for WebSphere No. It's ReBS for WS

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Faster Time to Service Customer Issues and Achieve Resolution

- Skill-based routing
- Rules-based escalation
- Resolution knowledgebase

Example: Customer inquiries are automatically routed to the customer service agent with the appropriate skills, who can quickly resolve the issue using Relavis eService's dedicated knowledgebase.

Increase Customer Satisfaction

- Improve speed and accuracy of problem resolutions
- Reduced system downtime
- Lets customers use the communications channels that suit them best (e-mail, phone, instant messaging, and fax)
- Provides call center staff with a single, organized work-queue, regardless of customer communication method

Example: A customer sends an e-mail message, and then calls regarding the same problem. Relavis eService associates both communication activities with the customer record and routes the problem to the appropriate specialists for resolution.

Lower Cost Per Request

- Customer and business partner/supplier self-service on the Web
- Instant messaging communication with customer service agent
- Automated workflow processes
- More efficient use of specialized resources

Example: While entering a problem or request on a self-service website, the customer uses Relavis eService's instant messaging to clarify the incident's characteristics with a customer service agent. The agent immediately sends an instant message to a product specialist. When the resolution is received, the agent immediately relays the solution back, via instant message, to the customer.

About Relavis Corporation

Relavis Corporation is the world leader in collaborative customer relationship management (CRM) solutions. Relavis became the eighth IBM business partner to become IBM Certified for e-business and was one of the very first companies to become a Lotus business partner.

In 1993, Relavis released OverQuota, now the eSales component of the Relavis eBusinessStreams collaborative CRM solution. Relavis solutions have transformed how organizations support their customers, partners and associates at more than 500 organizations representing over 100,000 users.

Customer confidence and trust has helped make Relavis one of the most successful and highly regarded software publishers in the CRM arena. Relavis' focus on delivering award-winning CRM solutions is driven by its people and partners, their domain expertise and their singular commitment to customer success.

Relavis has received the 2001 IBM Beacon award for "Greatest Business Impact" and the 2001 Lotus Beacon Award for "Best eBusiness CRM Solution." Relavis is honored to have won the Beacon Award seven times.

The company is headquartered in New York City.

More information can be found at http://www.relavis.com

About IBM

IBM is the world's largest information technology company, with 80 years of leadership in helping businesses innovate. IBM Software offers the widest range of applications, middleware and operating systems for all types of computing platforms, allowing customers to take full advantage of the new era of e-business.

The WebSphere software platform supports business applications from simple Web publishing through enterprise-scale transaction processing. WebSphere transforms the way businesses manage customer, partner and employee relationships. More information about the WebSphere software platform can be found at http://www.ibm.com/websphere

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Appendices

Appendix A – Linux

Open source and Linux are changing the nature of application development and deployment and allowing for integration of heterogeneous environments with flexibility and speed. Many of the Global 2,500 companies are already using open source software, Linux and IBM Linux-enabled products.

For distributed e-business applications, especially those with multiple location replication needs, Linux reliability, low total cost of ownership and Web-affinity with IBM products, services and support, is an especially attractive choice.

In the web environment, workload consolidation of numerous physical servers into a single ∧ platform running Linux, significantly reduces overall cost, improves systems management capabilities and enhances reliability and scalability of systems.

Clustering in Linux enables companies to link hundreds of Intel-based servers like the IBM xSeries™ to create low-cost supercomputing environments.

More than 70% of companies are using open source and Linux software to run e-business single-function appliances like firewalls, web servers, caching, and security servers. Linux and IBM ∧ and middleware enable improved availability, security, and performance for your end-to-end solution.

IBM is committed to helping Linux grow and become the platform of choice for e-business.

Appendix B – IBM iSeries Ô

iSeries and eBusinessStreams: High performance, integrated business server for mid-market

The iSeries for fast implementation, high performance, and near-zero maintenance for thousands of ready-to-run business solutions – IBM iSeries is designed for the secure end-to-end integration that businesses need to succeed with ERP, CRM, SCM, and business-to-business applications – plus speedy deployment with the lowest total cost of ownership and highest reliability in a single machine. The promise of EAS/SCM and the power of the IBM iSeries combine to deliver innovative technology, application flexibility, and new tools for managing end-to-end e-business, a world-class business solution.

- Specific benefits of iSeries
    - New e-business capabilities with Version 5 Release 1
    - Enhanced server virtualization
    - Award-winning Linux implementation
    - Leading Java™ and Lotus Domino performance
    - New options for managing xSeries
    - Flexible server consolidation platform
    - Multiple environments run on single system
    - Scalable server with data center-class performance
    - Shares processor roadmap with pSeries™
- Sizing guide and suggested configurations

A sizing estimate is an approximation of the hardware resources required to support the specific customer's eBusinessStreams implementation.

Appendix C – IBM pSeries

pSeries and eBusinessStreams: The most powerful, technologically advanced UNIX® servers

The pSeries, fastest, most technologically advanced UNIX servers – IBM pSeries offers leading UNIX servers that can help companies make a successful transition to e-business. Whether your organization requires a lower-cost and rapidly deployed server solution, the speed and power of a high-end system, or both, pSeries offers leading UNIX performance, unlimited scalability and flexibility, and interoperability for your current computing environment.

- Specific benefits of pSeries
    - The most advanced UNIX servers from entry systems to supercomputers
    - High-end p690 sets UNIX-server standard
    - Mainframe-inspired ultra-dense, low power packaging and self-managing features
    - Powerful consolidation tool with up to 16 virtual servers in a system
    - Features POWER4 – first dual-processor SMP on single chip
    - Extreme bandwidth and up to GHz+ power the needs of both commercial and high-performance computing applications
- Sizing guide and suggested configurations

A sizing estimate is an approximation of the hardware resources required to support the specific customer's eBusinessStreams implementation.

Appendix D – IBM xSeries

xSeries and eBusinessStreams: Most scalable Intel®-based servers with mainframe-inspired reliability technologies

The xSeries, affordable, Intel processor-based servers with mainframe-inspired reliability technologies for thousands of small businesses and large enterprises – IBM xSeries is implementing IBM X-Architecture™ technology, a blueprint for extending the benefits of advanced mainframe technologies to Intel processor-based servers. These benefits increase availability, scalability, systems management, service, and support providing affordable servers for businesses.

- Specific benefits of xSeries
  - Breakthrough Intel-based architecture
  - Pay-as-you-grow scalability
  - Multi-system SMP up to 16-way
  - Investment protection with support for both IA-32 and IA-64 servers plus easier transition to 64-bit applications
  - The latest in Project eLiza innovations – capacity management, system partitioning, real time diagnostics and Chipkill™
- Sizing guide and suggested configurations

A sizing estimate is an approximation of the hardware resources required to support the specific customer's eBusinessStreams implementation.

Appendix E – Relavis eService Summary

Key Features and Functions

Core Features

- User Management
- Contact Management
- Organization Relationship Management
- Activity Management
- Alerts
- Communication Center Logging
- Favorite Searches
- Historical Searches

eService Features

- Problem Resolution Management
- Problem Determination Questionnaire
- Escalation
- Resolution Review/Publication Process
- Knowledge Management
- Self-Service Subscriptions*
- Entitlement Management*

*Available in follow-up release later this year

Technologies & Tools

Technologies & Tools Used:

- DHTML + HTML + JavaScript + CSS
- XML
- Servlet 2.2
- JSP 1.1
- EJB 1.1
- JDBC 2.0

Supported On:

- Windows 2000 Advance Server
- IBM AIX® 5L
- IBM OS/400® *
- Java Implementation IBM 1.3+

Required Tools:

- WebSphere Application Server 4.0+
  - Advanced Edition
- IBM HTTP Server (1.3.19)
- IBM DB2 7.2
- MS IE 5.0+

Optional Tools:

- Lotus Domino 5.0.X
- Lotus Sametime Server 2.X
- Genesys T-Server v6.1
- WebSphere Studio Application Developer 4.03