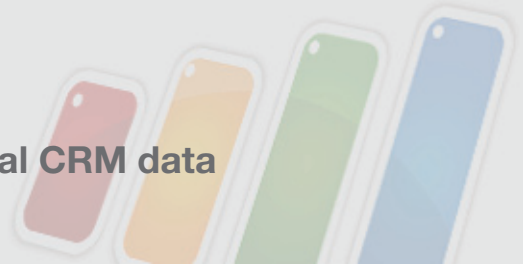




ClearPeaks

## A cure for better customer insight

### Picis implements FastTrack BI for unleashing vital CRM data



Success for a market leader like Picis, a worldwide provider of information systems for surgery, emergency department and intensive care units across the hospital enterprise, is based on an in-depth understanding of their customers, the marketplace and best-in-class internal processes.

### The Project

With the implementation of the market-leading Customer Relationship Management (CRM) system by Siebel, Picis hoped to bring together the key information to achieve a more comprehensive view of their customers. By providing their sales, marketing, and client operations teams with the necessary CRM tool and processes, the company built a solid foundation for the collection and management of customer interaction data. However like many organizations, Picis faced a huge challenge – unleashing the customer intelligence contained within their CRM system.

With all the data available in their CRM system, but limited capability to tap into this fertile source of information, Picis engaged ClearPeaks – an experienced leader in the delivery of customer intelligence solutions. The objective: Provide all relevant Picis business units with an easy-to-use yet comprehensive dashboarding, reporting and analysis capability across all levels of the organization; and allow for automated refresh and delivery of the vital customer intelligence.

### The Approach

The ClearPeaks Enterprise Intelligence Framework, a foundation for requirements analysis and business process mapping, served as an excellent starting point to identify the requirements of the various departments ranging from customer services, client managers to the sales and marketing team. The ClearPeaks team performed an in-depth analysis with the different Picis end-user groups to understand the various layers of dashboards and reports required to cover all aspects from performance management to the operational reporting needs.

With a clear understanding of Picis' overall requirements, ClearPeaks identified the most suitable and cost-effective business intelligence (BI) solution for Picis. The vital components of the proposed BI Framework included Business Objects® 6.5, FastTrack BI™ for Siebel CRM, ReportMessenger™, ReportPacks™ and Custom Dashboards & Reporting.

The basis for a solid BI foundation at Picis was the industry leading Business Objects' enterprise reporting solution. BusinessObjects Enterprise is a BI platform that powers the management and the secure deployment of specialized end-user tools for reporting, query and analysis, performance management, and analytic applications on a proven, scalable, and open architecture.



#### The Company

Picis

#### Industry

High-tech / Software

#### Objectives

- Provide a cost-effective reporting solution on Siebel CRM for ROI
- Empower Picis employees to analyze and report on key CRM data
- Provide a core set of CRM Dashboards
- Automate report refresh and delivery

#### The Solution

- Implementation of ClearPeaks' FastTrack BI for Siebel CRM and ReportMessenger utilizing the Business Objects 6.5 platform
- Rollout of core management dashboards and reports to support decision-making and performance improvements.

#### Customer Benefits

- Reporting and analysis capability of all customer touchpoints for full circle customer intelligence
- Automation of the manual forecasting process, improvements to campaign effectiveness, data quality and compliance
- Customer support resource optimization and identification of best practices



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“With ClearPeaks’ FastTrack BI solution we are now able to better analyze data, segment customers, measure the ROI of our marketing initiatives and provide a rolled-up sales forecast. This capability allows us to be more competitive, offer better service to customers and provide a faster response to changing market conditions.”

Kevin P., Executive VP of Client Operations  
Picis

## Creating a Solid BI Infrastructure

The required Business Objects components with their respective development, integration and production environments were set up on the BI server after successful deployment of a Microsoft® SQL Server™ environment that hosts the mirror of the Siebel production database. To allow for automated report refresh and delivery, ClearPeaks’ ReportMessenger was also implemented on the BI server.

In parallel to the infrastructure setup, the ClearPeaks development team initiated the adaptation of its unique FastTrack BI for Siebel CRM, a comprehensive end-user reporting environment to Picis’ Siebel CRM customization. This Business Objects-based universe covers virtually all fields of the business areas within the Siebel CRM environment: Accounts, Contacts, Opportunities, Campaigns, Activities, Service Requests and Products. Within a two-week time period, ClearPeaks added the additional required objects and filters identified in the discovery phase to FastTrack BI.

## Visualization of the Rich Business Data

With ClearPeaks’ pre-built ReportPacks as a basis and the BI infrastructure in place, the team set out to develop the initial core reports Picis required to effectively manage their business:

- **Services Dashboard (Balanced Scorecard)** provides the Picis senior executive team with the key performance metrics for the management of the client operations organization.
- **Services Turnaround Time and Services Backlog Reports** provide an accurate and actionable view of the key parameters turn-around time (TAT) and backlog for the Picis client operations organization.
- **Pipeline, Forecast and Data Quality Report for Sales** includes a set of five key reports within a Microsoft® Excel® workbook that are built with Business Objects full client and automatically refreshed and delivered via ClearPeaks’ ReportMessenger to the user e-mail inbox.

## The Status Today

Today, Picis uses FastTrack BI for Siebel CRM to access data from all business areas of the Siebel CRM application. With this information at their fingertips, Picis has enhanced data quality and compliance, turned their CRM data into actions, gained meaningful customer insight and further improved their closed loop sales and marketing process.

ClearPeaks continues to deliver BI services to Picis through a support and maintenance agreement that was signed as the result of the successful implementation of FastTrack BI and ReportMessenger.

