CUSTOMER MANAGEMENT IN A LOGISTICS COMPANY – WITH ORACLE BUSINESS INTELLIGENCE

Riverland Reply integrates Oracle Business Intelligence for a leading passenger transport company in German-speaking Europe. This is a first for the company since this is the first time a business intelligence system has been introduced. This also gives marketing a clear push, from controlling to monitoring up to the target group definition. And business processes are clearly optimised.

SUCCESSES – FROM THE CUSTOMER DATA TO THE CAMPAIGNS

The company uses several processes and systems to service corporate customers. One of the systems is Oracle Business Intelligence, which summarizes the data from the following source systems and prepares it for reporting:

– Data from the sales master data system
– Data from the sales data records system
– Data from the Oracle CRM system (discounts, customer hierarchy, offers, agreements, marketing, etc.)

The business intelligence system in particular shows the sales data records (company customer records) with the master and transaction data from the Oracle CRM system in dashboards and reports. The key functions are here to illustrate in particular the customer hierarchy with the sales data in roll-up mode (the subordinates in the hierarchy) and the drilldown possibility for observing the sales distribution in the hierarchy in more detail.

Oracle Business Intelligence is also used as a marketing tool. With this, reporting and marketing access the same data base, the Data Warehouse. The standard report and the ad-hoc analysis created by the user are used for controlling, to check the controlling and derive the target achievements. The marketing modules from Oracle Business Intelligence are used to build segments and lists to address corporate customers, depending on the channel used.

THE BENEFITS – CONTROLLING, MONITORING AND TARGET GROUP DEFINITION IN MARKETING.

The integration of Oracle Business Intelligence is the first integration of a business intelligence system in the company. From a specialist point of view, the company client business intelligence system is used in controlling, monitoring and target group definitions for marketing.

The following list shows some of the questions answered by the business intelligence system:

MARKETING WITH RELEVANT REPORTS AND COMPREHENSIVE DASHBOARDS

– Turnover development over the last five years according to customer structure and travel classes. The turnover amounts are shown with the differences to the previous year
– Current income development: Current income in comparison to the target from planning and the values from the previous year, as well as the forecast according to the manager for customers and marketing. Turnover is shown cumulatively by month.
– Current income development by quarter: Representation of income compared to the previous year at the quarter-year level
– Forecast for current month/cumulative: Analysis for monitoring the planning. Forecast with comparison to previous year and target values for each organisational unit and by month, as well as cumulative
– Income/forecast for the current month. Analysis for monitoring the planning. Forecast in comparison with the current income and previous year, according to organisational unit and customer
– Number of journeys according to actual numbers and plans in the current year and in the previous year, 1st class and 2nd class.
– Master data sheets for customers and companies (Publisher)

CAMPAIGN PARTICIPANTS (TARGET GROUPS)

– Welcome pack for new customers
– Newsletter for existing customers
– Survey of new customers at small and medium companies
– Activation mailing (achieving turnover)
– New level mailing (achieving turnover)

CHALLENGES

Reporting and marketing in the old company client system was tiresome and difficult due to the lack of a data warehouse and a business intelligence solution based on this, and it had the old familiar problems:

– Performance problems
– Static reports
– High effort to create static reports with data from different systems
– High effort to expand existing static reports

– No fully automatic data merging
– Reduced user group
– No standardised reporting and marketing tools

SUCCESSES

The ideal status neutralises the problems from the actual status and brings new business intelligence functions like drill-down and roll-up - dynamic and interactive for reporting. Also, new tools for marketing are made available by the Oracle Business Intelligence System:

– Performance of standard reports and ad-hoc reports via aggregations and Star Design
– Fully automatic data merge from all the different source systems, using ETL logic.
– Dynamic reports via drill-down and roll-up functions, especially when presenting the customer hierarchy with turnover amounts
– Interactive navigation for reports and dashboard
– Reporting and marketing are based on the same data
– Turnover data which only exists in the DWH should be made available to tie CRM system via interfaces, so the CRM system can derive further actions from it
– Operative BI

PROJECTING THE BUSINESS INTELLIGENCE SOLUTION

The first release of the Business Intelligence company client system was implemented with an iterative project methodology. Altogether, three iterations were carried out, with a finalising workshop for each, to ensure that the company gets the required functionalities. After the first release, there followed another three service packs and several fix packs to deliver newly requested functions and bug fixes. Parallel to the three service packs, the existing business intelligence solution was expanded to include agency distribution.