

# PRIVATE CUSTOMER MANAGEMENT IN A LOGISTICS COMPANY – WITH ORACLE BUSINESS INTELLIGENCE

Riverland Reply integrated Oracle Business Intelligence in the corporate system of a leading public transportation enterprise from the German speaking countries. The business intelligence system uses dashboards to primarily illustrate complaint management and the areas of loyalty and marketing. CRM and marketing activities cover a large part of the customer life cycle. This clearly optimizes the business processes beyond the target audience.

## SUCESSES: PURCHASING BEHAVIOUR, CUSTOMER CARDS AND CAMPAIGNS

The company uses several processes to wrap up private customer business. One of the systems is Oracle Business Intelligence, which summarizes data from the Oracle CRM system (transactions, customer card orders, procedures such as complaints, customer requests, ...), premium orders etc. for evaluation purposes and provides the data for reporting. The business intelligence system uses dashboards to mainly illustrate complaint management and the areas of loyalty and marketing. Ad-hoc reporting is also available for these areas. The Oracle Marketing Module, which is mainly based on loyalty data, is used. In the area of complaint management, all processes are shown among other things. This creates a large degree of transparency. The life-cycle for the individual processes can be called at any time and can therefore be used for internal process optimisation.

The area for loyalty uses standard reports to provide information on the amount of customer cards and the customers' purchase behaviour. The ad-hoc reporting provides additional in depth evaluation possibilities for the sub-areas:

- Transactions
- Point levels (bonus points)
- Bonus orders
- Reaching point thresholds

## MARKETING WITH RELEVANT REPORTS AND COMPREHENSIVE DASHBOARDS

The third large area that is illustrated by the Oracle BI is marketing. This accesses the evaluations from the Loyalty area to, for example, send targeted mailings on reaching point thresholds and a regular overview of the collected bonus points. Furthermore, the Marketing area provides information on advertising blocks at a personal level to prevent contacting customers via a channel they do not want. Customer card holders who generally do not want to participate in advertising measures can thus be identified and explicitly taken off campaigns. But target groups can not only be illustrated over the contact level but also at the customer card level to, for example, limit to specific information that is directly linked to the customer card. This is done with the help of the segmenting that is available in the Oracle BI. With appropriate filters, the optimum campaign target group can be determined to increase the success of the campaign. The response quotes can be called up at any time using standard reports.

The integration of Oracle Business Intelligence is the first integration of a business intelligence system in a private customer system. From a specialist point of view, the business intelligence system is used for controlling and marketing purposes. The following list shows some of the questions answered by the business intelligence system:

### REPORTS AND DASHBOARDS

#### COMPLAINT MANAGEMENT

- Evaluation of compensation services
- Monitoring of external and internal service level
- Analysis of contact development
- Report on processes by status

#### LOYALTY

- Development of the customer card levels
- Customer purchase behaviour

#### MARKETING

- Number of customers per campaign
- Response tracking

#### CAMPAIGN PARTICIPANTS (TARGET GROUPS)

- Informational mailings for customers who, based on their current bonus point levels, are shortly before reaching the next higher point threshold
- Regular overview of the bonus points collected
- Communication of any points about to expire
- Birthday mailing
- Newsletter

## CHALLENGES

The reporting for the private customer area previously used complaint management reports and operative reports on an SQL basis (loyalty). The complaint management reports are based on the "old data" that was maintained along with the Oracle CRM system. Since the introduction of the Oracle CRM system, all procedures, customer requests, etc are kept there only so that the customer complaint reports only form a part of the complete data. With the migration of the old data into the Oracle CRM system, the reporting also had to be converted. The operative reports for the Loyalty area use the Oracle CRM system as the data basis. In other words, only a sub-set of the data. To create unified reporting, these reports must also be taken into the Oracle BI:

- BO (customer complaint) reports based on the old data
- Operative reports per SQL on the basis of Oracle CRM data
- Migration of the old data into the Oracle CRM and therefore the loss of the data base
- No illustration of the complete data base
- No unified reporting
- Existing reports do not reflect the actual requirements
- Performance problems

## SUCCESSSES

In the first step, the BO and the operative reports were imported into the new BI system. This provided the users with a unified platform for reporting. In a second step, the data were loaded from the "old data pool" into the BI system which enabled the users to generate queries for the entire stat pool from the past. The users can not retrieve the necessary information over pre-set dashboards or with individually set queries. The first implementation of the Oracle BI EE Suite and the Oracle BI applications neutralized the disadvantages of the previously used technology. The main improvements do not only consist of the clear increase in usability but also in a considerably higher performance ETL:

- Automated ETL process for loading the data warehouse from the Oracle CRM system.
- No load on the operative system from reporting queries.
- All relevant reporting data are available on one system.
- Optimisation of the runtime for standard reports by providing aggregates
- SQL knowledge is not require to generate reports
- Reduction in number of standard reports
- Implementation of actually required reporting needs in dashboards
- High flexibility in the generation of ad-hoc queries by the user
- Perfect foundation for marketing campaigns with a variety of attributes for segmenting

### PROJECTING THE BUSINESS INTELLIGENCE SOLUTION

The first release of the Business Intelligence private customer system was implemented in the classic waterfall model. The functionalities of the old data system were implemented and additional requirements were added that came from the new Oracle CRM application. After the first release, there followed another four service packs and several fix packs to expand the function of the application.

The project management and implementation of the release were parallel, this means that during the end phase of the development of the current release (such as the service pack, fix pack), the implementation of the following release had already been started. This procedure made it possible to integrate numerous new functionalities into the running application in an extremely short period of time. A major challenge is presented by the enormous amounts of data that are in the data warehouse and which are to be loaded into this. On the one hand, the data must be migrated from the old basis retroactively and on the other, all loyalty data (transactions, point levels, etc.) are loaded into the BI system daily. This situation makes it urgently necessary to check the runtime of the ETL process with each new release and to optimise this if necessary.



Riverland Reply specializes in technical consulting, implementation and system integration in various fields like processes, business solutions and technologies. The core competencies of the company include, among others, customer relationship management and business intelligence. Riverland Reply develops and implements tailor-made versions of Oracle solutions in these areas. The inclusion in the network of the European IT service provider Reply offers access to the knowledge of over 3,000 IT experts. In 2010, the Reply network of companies had a turnover of approx. 384 million euros in the main offices in Italy, Germany and the United Kingdom. For more information visit [www.reply.de](http://www.reply.de).