



CLIENT ONLINE DONOR COMMUNITY (ODC) PROJECT

ABOUT THE CLIENT:

Our client is a nationally renowned cancer treatment and research organization. The client provided care for nearly 105,000 patients in 2010 and employs more than 17,000 medical and administrative staff.

PROJECT OVERVIEW:

Our client is in the process of implementing an Enterprise CRM Solution Infrastructure that covers all aspects of Retail Customer data interactions using a variety of Oracle based software. This project is an effort to size and establish the required hardware, software and network infrastructure that would be necessary to implement the Enterprise CRM Infrastructure.

Besides the technical architecture for the CRM implementation, this project also includes the development of a master data management suite to facilitate the integration of disparate customer data sources across various business units.

Key objectives of the CRM Infrastructure project are:

- ◆ Establish and setup the base technical infrastructure to enable the rollout of the CRM and ecommerce solution set to individual business units in a phased manner.
- ◆ Assist in the installation and configuration of the suite of Oracle Siebel products currently licensed by the client.
- ◆ Design & develop an integrated master data management solution that facilitates the integration of customer data across the disparate data sources using Oracle's Siebel UCM application suite.

Client Donor Portal implementation requires providing social networking capabilities to the donor community and providing users the ability to create personalized donor stories. The Donor Portal provides easy creation of community pages. Community pages are created by Client Administrators and may be available to all users or restricted to specific user roles.

Customer details are captured into Siebel and those details will be synchronized with an external non-credit card donation system. Donations can be classified into General, Memory and Honor. Customers can donate gifts based on Gift type. Based on the selection of Gift type, a background process is triggered. If a customer made a General Donation, then that process will send an



email to that customer and that email contains information about the customer (name, address, phone number, etc) and gifts (gift number and type).

There is one more process called “Punch Out” for completing the successful donation. It includes

- i. Accept Credit Card Payments using a PCI compliant punch out form.
- ii. Web Service to call Global Transport from Punch out process.
- iii. Production ready Punch Out process.

CHALLENGE:

The client wanted to enhance the customer experience by being more responsive to customer requests. In addition, it sought to optimize the work and information process flow to achieve operational excellence.

Speridian had to address several challenges:

- A. Client ODC implementation required having the ability to allow for personalized fund raising pages. On such event, Third Parties request the creation of web pages hosted by the client.
- B. Client Contact & Event attendees Information’s are maintained by Backend System that has been subsequently migrated to Siebel 8.1 Online Donor Community System. Before sending an Event Invitation need to Import the Event Invitees List (CSV File) from Backend System to Siebel then associate the Invitees list to the corresponding event. The purpose of this requirement is to Import Contact and related address information from Backend System to Siebel 8.1 Online Donor Community System.
- C. While sending Event Invitation to customers, need to populate Confirmation Number in the Email Template for each customer based on Events.

SOLUTION:

Our solution enabled the client to host a fund raising web page that allowed them to enhance customer experience and provide their customers with more personalized service. Always in tune with our customer’s requirements, we utilized our position as an Oracle platinum partner to raise a high priority Service Request with them to populate the Confirmation Number based on Events in order to satisfy their needs.

RESULTS:

Our solution realized several benefits:

- More effective service delivery
- Stabilize the system with an overall reduction of around 30% in cost of maintenance
- Reduce maintenance effort requirement by 60%