

## Leads Management Case Study

Client's Leads Management initiative was an attempt to develop integrated workflow system that consisted of

- FA's identifying their profile,
- Client's launching marketing campaigns,
- Attracting potential clients to file in their profile,
- Capturing and processing information,
- Identifying and focusing on the appropriate clients,
- Tracking them, and
- Finally converting them into clients.

Client approached ebusinessware with their goal to offer initial capability within a short time span followed by incremental stage-by-stage implementation of the entire solution. The need for a quick implementation was deemed necessary for analysts to appropriately cover prospective clients.

In this case study we illustrate how ebusinessware professionals applied their expertise in architecting and implementing an integrated solution.

### **1. Overview**

A full-blown leads management system is made up of very complex set of workflow rules therefore a huge undertaking for an organization. Business rules from a large number of legacy systems had to be harnessed making the effort even more challenging. The problem at hand was to offer number of sophisticated capabilities without using any of the 3<sup>rd</sup> party products to ensure lowest possible cost but at the fastest time-to-market. The business need was to offer a consolidated workflow of Internal analysts, Client and 3<sup>rd</sup> party campaigns, Client profile, Client tracking, and Follow up to conversion.

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Some service providers may perceive such an undertaking as an impossible challenge but ebusinessware looks forward to such opportunities. We are well equipped to handle time bound and complicated projects and felt obliged to accept the challenge of aggressive timelines within a fixed price budget

UniRAD is ebusinessware's solution implementation methodology.  
See [www.ebusinessware.com/whitepapers/unirad](http://www.ebusinessware.com/whitepapers/unirad)

### 2. Phased Method

#### Find an FA

This was the first module / phase undertaken as part of the entire effort within the established ICAF framework. It was developed offshore and integrated onshore within a tight deadline and fixed budget. The technical environment was CICS/MVS/COBOL, ICAF and DB2. The application was integrated with about seven touch-point systems. The phase involved:

- Creating the matching engine to match financial advisors to (new business) leads.
- Creating the user interface pages for registered guests (in ICAF) to be able to establish their criteria and select an appropriate FA
- Implement the workflow as per the business requirements.

#### Leads Management 1

This phase had been on the business (marketing) agenda for many quarters but had not been undertaken because of ambiguity and open-endedness in the business rules. There were numerous off-the-shelf tools that were available but needed a significant investment for implementation. The ebusinessware management team assisted in scoping out the implementation in distinct phases with concrete deliverables, while helping manage the project outlay using a combination of onshore/offshore development and team size. This phase was a small application implementing the workflow for routing the lead through its lifecycle using various established PSI/Client enterprise applications and worked in conjunction with the Find an FA engine. The project delivery included:

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- Integrating with the various applications for messaging (ETS), CRM (BOSS 3000/CM), data sourcing (Registered Guest and Find an FA), assignment engine (Find an FA) applications
- Developed in Java using Websphere Application Server using DB2 and MQ Series messaging.
- Reports developed using Crystal and distributed using Infopac.

### Leads Management 2

LM-II was an extension of the LM I application. At the end of the previous phase, the business owners performed a vendor evaluation for extending the functionality of the leads rules and workflow engine. This phase was to be a more comprehensive campaign management solution. Given the budget and timing requirements, the project owner figured out the optimal scope/cost/time structure for LM II and the project was objectively awarded to the ebw team. The salient features of this initiative were:

- Building a flexible rules engine for campaign-based matching leads with Fas.
- Integrating with various internal and external source systems spanning various environments.
- Using XML based interfaces for easier integration with feeder systems
- The project was designed with the capability to go cross-enterprise (across LOBs) for leads management
- Designed with a scalable architecture and leading design patterns
- Implemented in Java/EJB using Websphere 4.0 (EJB spec 2.0).

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### 3. Our Approach

As always, our solution implementation handbook was opened and a set of templates were customized for this project. Checklists were created and requirements templates were customized and the relevant material was spread around the teams and users. Following are some of the deliverables that came out of the initial envisioning sessions:

- Client's objectives summary
- Team Allocation - onsite and offshore
- Roles and responsibilities were defined and communicated to team members
- Quality goals were established in terms of number defects permitted per person-month
- Timelines were established, along with milestones and targets
- Risk tracking and risk management strategies were defined

Using the UniRAD framework as a guideline, two high-level teams were formed to perform following two streams of activities in parallel.

Our teams were diversified, within-depth technology and business / subject matter understanding. The streams were organized as described in the following figure:

### Team Organization

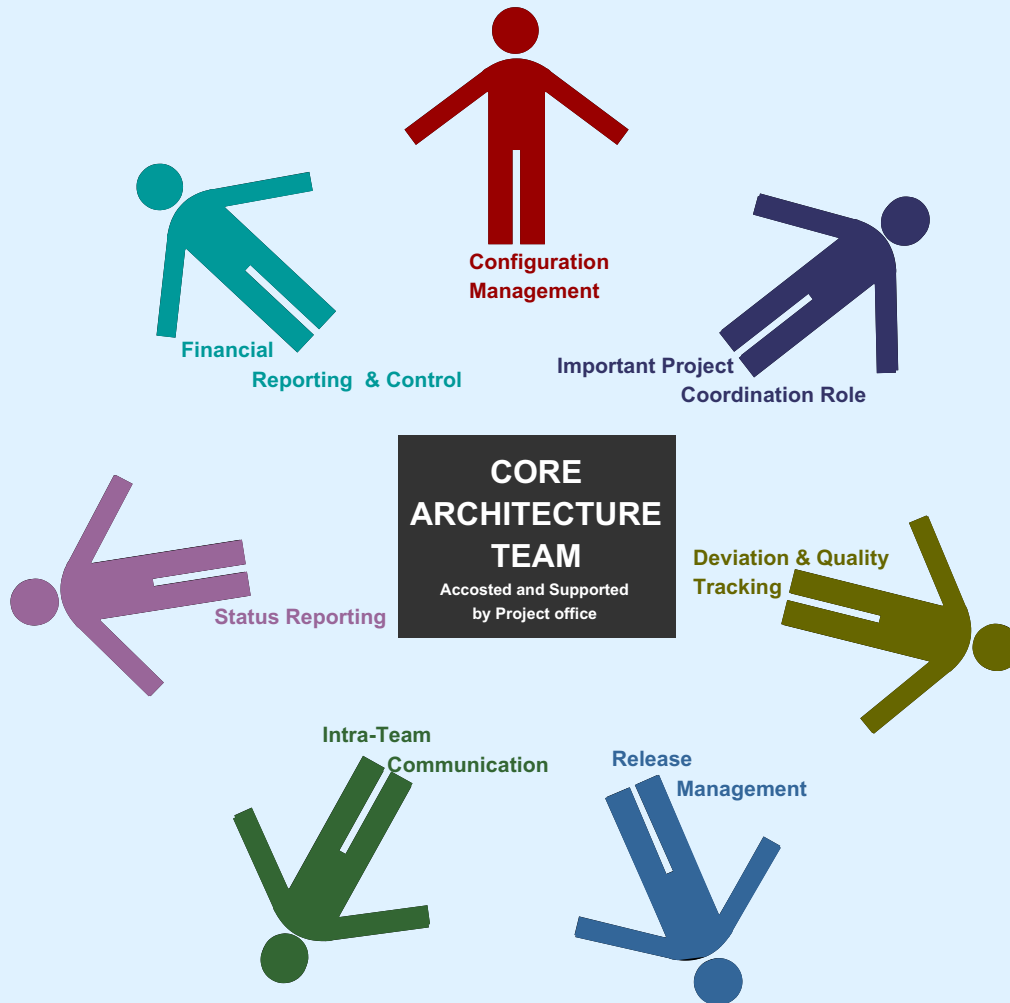
Teams were divided into two categories: Core Architecture and Supporting Project Office. While the Core Architecture Team was working on investigating the possibility of a solution set provider and provider's fit in the entire initiative from technical feasibility point of view, the Project Office was supporting it by complying with UniRAD guidelines and insulating it from any resulting distraction.

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Team members were asked to get back to the management with two types of checklists

- acknowledgement that they have individually read and understood the business requirements and technical specifications.
- Any gap (for training purpose) for them to be able to work at highest productivity in this project.

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### 4. Making It Happen

#### Challenges

The team was confronted with a series of challenges as part of the implementation:

The 'Find an FA' application had to be written in COBOL and executed in mainframe environment. It was decided to architect the Leads I application in J2EE but it had to seamlessly interface with the mainframe based applications to process the data. It was the first time in the history of client that J2EE was used to access mainframe data so the environment was completely unknown. Message queues were used extensively.

Leads II was supposed to be even more dynamic and rules based lead processing engine. Various business units were utilizing different strategies, different systems, and different metrics to acquire new business and measure success.

Existing client's acquisition process was a long and manual process in which lead information passes through various hands before reaching the eligible FA. There was a business need to develop a system that should standardize the different strategies, systems and metrics to acquire new business and measure success and also to replace the manual process of lead processing. The biggest challenge was to create a dynamic, rule based assignment engine, where addition and deletion of rules should be in hands of the campaign managers instead of developers.

Entire system was designed using the best available design patterns like Message Façade, Session Façade, Generic Attribute Access, Custom Data Transfer objects and Inter-tier data transfer using HashMaps.

### 5. About ebusinessware

ebusinessware's process discipline is based upon learning from the successes and challenges of past engagements and is rooted in the leading thoughts of quality driven metrics from movements such as the total quality or Six-Sigma initiatives. Borrowing from the existing literature on the subject, we are aiming for two types of quality:

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- Customer Quality we want to ensure that customers receive the proposed benefits of outsourcing such as cost reduction, risk reduction.
- Engineered Quality we would like to ensure that we provide reduced defects in association with our service offering.

With the goal of continuously measuring and controlling quality, we arrive at a process transition that does not lose the drive towards innovation. We follow this framework because it enables ebusinessware to fulfill all three elements of our value proposition.

### our value proposition

