



ebusinessware

## Case Study

### Personalization Case Study

The “Personalization Project” was client’s first attempt at offering personalization capabilities on their client’s website. When client approached ebusinessware last year, their goal was to offer initial capability within two months. The need for a quick implementation was driven from a desire to keep in line with competitors as determined by of client’s satisfaction surveys and interviews. In this case study we illustrate how ebusinessware professionals applied their expertise in architecting and implementing a state-of-the-art personalization solution for client.

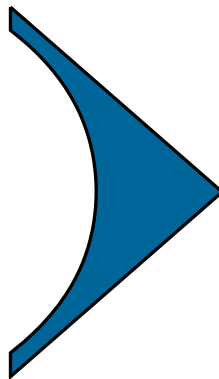
#### 1. Overview

A full-blown personalization initiative is a huge undertaking for an organization. It becomes even bigger challenge when existing legacy system interfaces are also required. The problem at hand was to offer a portal-like user interface and personalization capabilities but at the fastest time-to-market and the lowest possible cost. The business need was to offer a consolidated view of news, weather, stock watch list, market watch, and client balance information. Some service providers may

#### “Portal-Like Functionality”

Consolidated view of:

- News
- Weather
- Stock Watch List
- Market Watch
- Balances



#### Goals:

- Speed to market
- Lowest cost
- Integrate with legacy applications

#### ebw Response:

- Find a solution provider
- Fixed price
- Get live in 2 months

perceive such an undertaking as an impossible challenge but ebusinessware looks forward to such opportunities. We are well equipped to handle time-bounded and complicated projects and we accepted the challenge of aggressive timelines within a fixed price budget.

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### 2. 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:

### 3. Team Organisation

Teams were divided into two categories: Core Architecture and Supporting Project Office

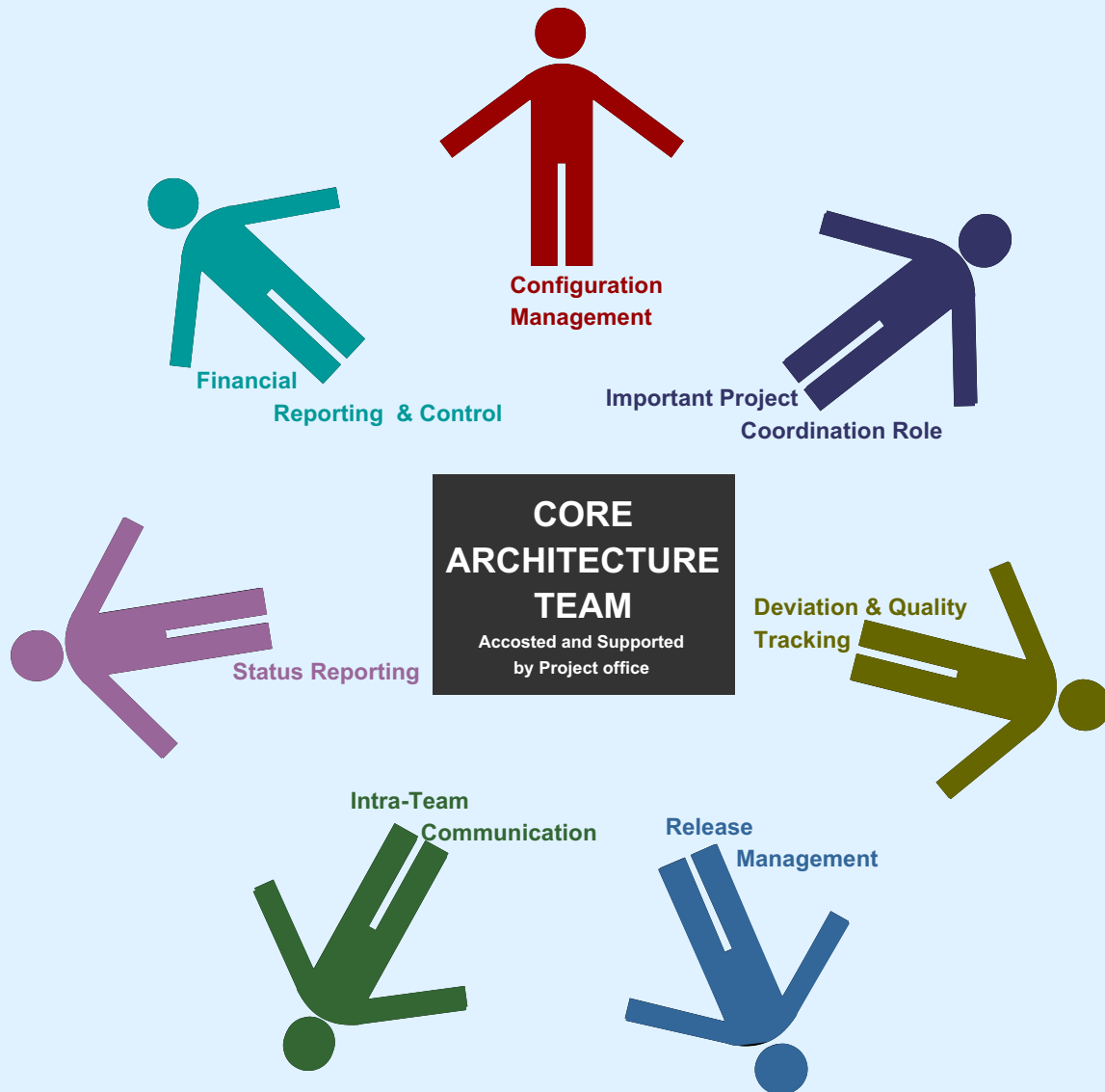
While the Core Architecture Team was working on investigating the possibility of a solution set provider and provider's fit in the entire initiative from technical feasibility point of view, the Project Office was supporting it by complying with UniRAD guidelines and insulating it from any resulting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

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Team members were asked to get back to the management with two types of checklists 1) acknowledgement that they have individually read and understood the business requirements and technical specifications. 2) 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:

- Integrate the personalization system offered by Yellowbrix into the proprietary ICAF architecture.
- Strike a compromise between the number of features open for personalization v/s fixed content like message board.
- Interfaces with the mainframe systems for client's account extraction and marketing message Extraction
- Interface with the Bridge data servers using the proprietary ICAF architecture.
- It was disclosed that proprietary ICAF architecture had never been stressed by having to connect with so many external interfaces; neither was it tested for certain functionalities that would have been required in this personalization endeavor.

Team worked closely with the client's information architects to deliver the following content from various data sources for phase-1.

1. Message Board - Marketing messages
2. Portfolio Net Worth - From the mainframe
3. Watch List - Stock quotes from Bridge data servers
4. Market Snapshot - From Big Charts
5. News, Weather, Short-Cuts - Yellowbrix

Another challenge to work closely with all of the data providers and making sure their interfaces were as designed to meet the protocols set in the beginning by our team.



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We also worked closely with clients experience group to come up with a cross-browser compliant html for the project

#### Focus Group of Clients Refine the Offering

To maximize the return on investment on this project, client decided to conduct a Client Focus-Group research-study for this project. Actual clients participated in these studies and offered their comments on the usability and desired features for the project under discussion. This research provided some interesting findings. We accepted the need to deliver the enhancements proposed by the research findings even at a later stage in the project in an effort to deliver maximum satisfaction for the first Offering.

#### Development Statistics

- Our solution for Phase 1 was to leverage an ASP (Application Server Provider) that had a Personalization engine. After evaluation of their system capabilities, Yellowbrix was chosen for this purpose.
- Development was mostly done on the internal ICAF (Internet Client Application Framework) platform with heavy use of XSL for screen rendering. An offshore team worked on the XSL and the onshore team worked on integrating the XSL into ICAF as well as integration with all other data source touch-points. The project from delivered into QA from the time we started analysis in a record time of about 8 weeks.
- We also helped client with their extensive cross-browser cross-OS testing in their QA Lab. The application was tested on several MS-Windows flavors like Win98, WinME, Apple iMac, with browser from IE4.x, IE5.x, Netscape 4.x etc., at various dial-up modem speeds and with ISP browsers like AOL.

Because of the expected popularity of this application once it goes live and the number of data sources that are hit to produce the personalized page it was decided to Stress Test the application in a production-like environment. The application was tested with an elaborate load script using Load Runner. The application successfully passed the stress test with acceptable page load times.



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#### Going Live, on-time and at budget

The Client went in production and within first couple of weeks the number of unique visitors far exceeded the initial estimate without breaking or slowing down the application. The application has been in production since early February 2002 and has grown in its popularity every passing day.

Several enhancements have now been proposed for Phase 2 of this project and we worked with client's architects to come up with a strategic personalization solution that is in line with client's long term portal strategy as described below:

#### 5. Next Step

The success of Phase 1 proved the case for Personalization and resulted in a follow-up initiative to enhance the user experience and create a strategic back-end platform for Personalization. Client approached us in October 2001 with a limited budget and timeframe to come up with a solution that would prove the business case for Personalization and also be extensible enough to scale in the future. Phase 2 is currently in QA Testing and will be in production early November. This Phase moves away from an ASP model to a more strategic personalization engine - datafeeds from News, Weather, Stock Quote vendors have been developed for this purpose. This application now serves as a portal that draws clients deeper into the site.

The ultimate goal for a personalization solution is to reach a level where the system has a 360 degrees view on individual clients that enables "recommendations" to sell cross lines of business products as well as promote areas of site that have the highest chance of appealing to the individual. This form of personalization is called Collaborative Filtering and the outcome is "organic" because the outcome of the recommendations depend on user behavior which may change continuously. The eExperience group at client's has a multi-phase strategy to arrive at collaborative filtering.

Going forward we have recommended an architecture that client is currently reviewing to use the Websphere Portal Server and Websphere Personalization Server as strategic pieces in the puzzle. Websphere will provide a unique user experience tailored to an individual's behavior on the site. A byproduct of the vendor product is the ability to create personalized marketing and emailing campaigns. The platform will further support personalized messages to appear on various pages of the site. Phase 3 will raise the bar on the level of personalization where the end user gets very targeted messages, find links to their "most visited" or "most likely to visit" areas within the site along with an improved level of customization.



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#### 6. 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:

**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

