

The Situation

Integra's client, a leading full-line insurance firm, had a substantial existing implementation of Siebel Financial Services CRM 7.5 and Siebel Analytics 7.7, deployed for over 1,100 users worldwide. CRM modules in use included Sales, Marketing, Call Center, Sales Analytics, and Marketing Analytics. Our client wished to upgrade their CRM implementation to Siebel 8, while enabling Siebel Service as new functionality, and also upgrade Siebel Sales Analytics and Marketing Analytics to Oracle Business Intelligence Applications 7.9, with a concurrent upgrade of Siebel Analytics 7.7 to Oracle Business Intelligence Enterprise Edition (OBIEE) 10.1.3.

The Challenge

Anytime a company upgrades so many modules simultaneously, the upgrade process is never something to be undertaken lightly. But our client faced the additional challenges of needing to perform the upgrades extremely quickly, while maintaining near 24 x 7 call center capability, in an environment characterized by stringent regulatory requirements, complex integration to legacy systems, and heavily customized functionality in Siebel Call Center and Siebel Analytics. Further complicating matters were required upgrades that needed to be performed on ancillary systems, such as Informatica, to support the target versions of the Siebel and Oracle applications, as well as the client's dependence on the Miller-Heimann structured selling methodology, support for which was discontinued by Oracle in the Siebel 8 product release. Additionally, this effort faced many "unknowns"; as this upgrade represented the first simultaneous upgrades to Siebel CRM 8 and OBIEE 10.1 on the DB2 database platform.

The Solution

Integra was selected to perform this complicated upgrade project on the strength of the experience of our practitioners and our flexible approach to partnering with our clients. Integra's team of deeply experienced team Siebel CRM and Analytics functional, technical, and project-management consultants brought to this client our battle-tested Siebel rapid upgrade methodology. This approach, which is both iterative and based on heavy parallelization of work-streams, enabled us to define a plan to accomplish the upgrade from start to finish in only 24 weeks, which included all project preparatory and planning time, business process and requirements work, time for hardware acquisition, and two weeks of "slack" in the schedule; actual upgrade project execution time was just 16 weeks.

The scope of work performed includes a significant business process and requirements effort to document, streamline, and standardize procedures across multiple business units, technical upgrades of Siebel CRM and Analytics, application configuration to enable new features and functional enhancements, new module implementation (Service Requests), replacement of Miller-Heimann functionality, substantial data integration and ETL work, and rigorous manual and automated testing.

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The Results

In this project, the Integra-led, blended team of client and Integra resources successfully completed one of the fastest Siebel 8/OBIEE upgrade projects of this scale executed by any Siebel customer to date. Production go-live was smooth and uneventful, and both Integra and our client are pleased with the delivered system and quality of work that went into its development. The rigor of our approach and quality of resulting work products have set a new standard for execution which this client has already begun to adopt for its future IT projects.



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