

**Business Process
Improvement Where It
Makes Sense**



The multi-faceted relationships between applications, business processes, customers and knowledge professionals continue to become more complex throughout companies. As a result, business leaders have looked to technology solutions such as Customer Relationship Management (CRM) to address this complexity and their organization's business requirements with new systems or to manually re-engineer processes. Unfortunately, these efforts often make the working environment more complex, less agile, and more inefficient forcing organizations to adapt to newly re-engineered processes and systems. A new approach has emerged to address these issues through business process management using desktop integration.

The Challenge: Streamlining Business Processes

In a perfect world, every step in a CRM-driven sales process would flow smoothly from the moment a company reaches out to its customers with a promotion all the way through procurement to after-sales support. The problem is that delivering on the promise of CRM - integrated applications, automated business processes and a single view of customer information – is all too often an expensive multi-year IT project. Added to this are a lengthy implementation time, budget overruns and increased business risk, legacy management, operations and logistics applications, information portals and intranets, SFA and ERP suites. The integration challenges facing enterprises can seem almost insurmountable.

As businesses move from implementing individual stovepipe applications that address specific requirements to middleware, portal, and limited integration solutions to solve data and process issues, particularly within specific departments, they are discovering that the solutions are not providing expected benefits. One result has been to turn to Enterprise Application Integration (EAI) to share, automate and manage business processes. Although some systems are integrated over time, there are limitations and drawbacks to these EAI solutions:

- Time – Typical integration projects tend to take months or years to complete thus limiting their effectiveness. The technology or business processes may change making the integration effort obsolete.
- Cost – Efforts to integrate systems can be very costly to begin, implement, and maintain.
- Application Specific – Integration technology may be limited to address specific platforms and/or applications.
- Invasive – The integration effort may involve initial and ongoing modifications to application codes or new applications may need to be developed to complete the effort.
- Downtime – Server-side integration efforts require complicated network infrastructures and increase downtime when integrated systems such as portals are not available.
- Risk – In server-side and composite integration solutions, you are emulating the behavior of legacy applications in a new composite client. These types of integration require that that all business processes and data components at the server be captured. If you leave something out, the old processes are broken.
- Flexibility – Solutions that integrate systems must be agile to meet ongoing operational needs and changing business requirements. The tools agents use must respond quickly to service issues and be changed in a timely manner when necessary. In the same manner, the technology must be quickly configurable to meet business needs when new products and services are offered.

As new technologies are implemented, the underlying problem of maximizing technologies where they are used is still not being fully addressed. Although many of these technologies such as EAI and CRM integrate data and some processes, they have produced limited results. A fundamental shift has occurred to address these limitations with the introduction of Business Process Management (BPM) where businesses switch to “process-managed enterprises” as coined by Howard Smith and Peter Fingar in their new book “Business Process

Management: The Third Wave.” In this new approach the business process is “freed from its concrete castings in technology and made the central focus and basic building blocks of all automation and business systems.” The goal of this new wave is to focus on the processes, to change the primary design goal, and to empower the business to define and deploy business processes.

A Desktop Solution: Focus on Process

Enter a new paradigm that focuses on defining and streamlining business processes and integrates systems where they are used – at the desktop. Desktop integration is an effective approach to organize even the most complex work environments, streamline processes, and reduce the amount of time the knowledge worker spends completing tasks (See Figure 1). In addition, desktop integration is non-invasive and requires no server-side integration, in contrast to EAI, thereby reducing integration costs, eliminating the need for additional, complex infrastructure and lowering implementation time from months to weeks.



Figure 1 - An Integrated Desktop with Disparate Applications creates a Unified Customer View

Compliance, Consistency and Best Practices

Desktop integration improves productivity by eliminating redundant data entry, streamlining processes, and organizing application screens logically. Fortune 500 companies that use desktop integration have also addressed organizational and training issues related to mergers, acquisitions, and other changing business needs. This type of integration has proven invaluable in reducing call times in contact centers, allowing them to focus on cross-sell and up-sell opportunities with customers. For example, a financial services contact center agent receives a call from a user who wants to open a new credit card account based on a recent promotion. Without desktop integration, the agent must complete between eight to nine steps to complete the process (See Figure 2). With desktop integration, nearly half of the steps are automated to complete the same set of tasks shortening the call and improving customer satisfaction. In addition, streamlining processes with desktop integration eliminates potential data entry mistakes, ensures consistency and compliance, and provides additional cross-sell opportunities.

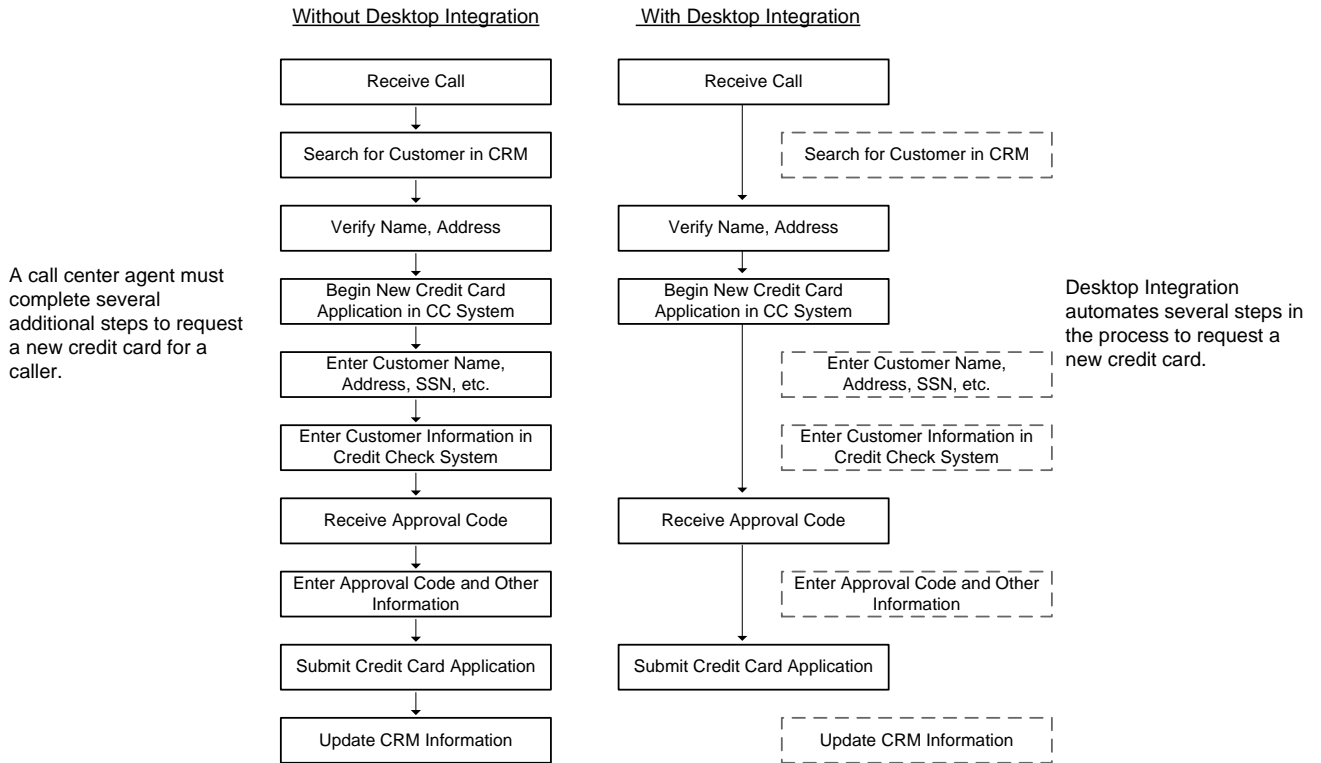


Figure 2 – An Example of Streamlining the Process to Request a New Credit Card

Desktop integration also provides a means for enforcing rules related to compliance and business requirements (See Figure 3), enforcing best practices and increasing consistency, improving the quality of each interaction and customer satisfaction. In addition, desktop integration allows companies to be more flexible in regards to how technology is implemented and used. New applications are easily integrated with legacy systems while only exposing those screens, data, and processes of broader applications as necessary for specific knowledge workers and related systems-as-a-services to support a Service-Oriented Architecture.

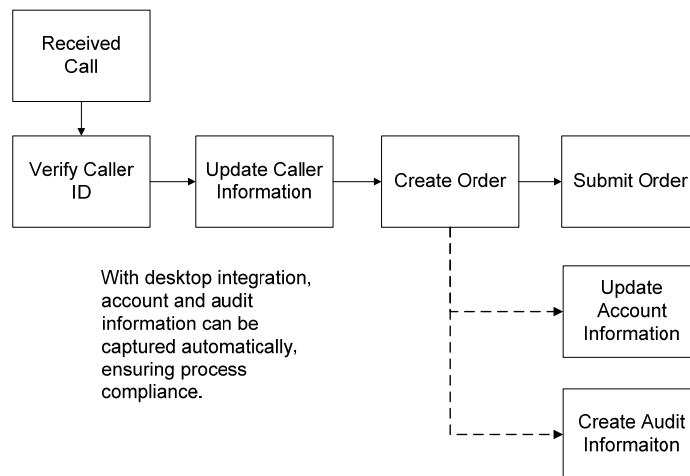


Figure 3 - Desktop Integration completes Additional Processes

Cicero's desktop integration has a proven track record maximizing the use of technology, improving customer service, reducing costs, and improving revenue opportunities. Cicero delivers efficiencies to various verticals from contact centers to intelligence analysts. In one recent implementation, it was used to integrate 900 agents' desktops in just seven weeks, reducing the average call times by approximately 40 seconds and allowing agents to spend more time with customers and handle more calls. At the same time, the contact center was able to roll out a new application and Cicero was used to quickly integrate it into the unified desktop, minimizing both the training and operational impact to contact center. Due to improved agent productivity and shorter call times, the savings were over US\$1 million in the first year with an ROI of approximately 5 months.

The Future: Business Process Improvement at the Desktop

By focusing on the business processes and the tools that are in front of knowledge workers, desktop integration provides a framework of creating a process-managed working environment that best meets the business goals and requirements. Desktop integration also provides a vehicle for changing processes by quickly defining how the technology needs to respond to the business process without writing application code and thereby, reducing the need for a complex IT project. In addition, desktop integration supports best practices, compliance, and consistency in following existing and new business processes. Finally, desktop integration provides knowledge workers whether they are in a contact center or across business units a working environment that improves efficiency where it has the most impact – at their desktop.