

**Enterprise IT Success  
in a Fortune 500  
Insurance Company**



## Enterprise Success and Growth Create Big Business Problems

A Fortune 500 Insurance company had experienced rapid growth and change through mergers, acquisitions and market-driven reorganizations. Managers and executives at all levels were challenged by:

- Merged functional units with incompatible staff training, standards, and skills
- Conflicting and inconsistent business processes
- Assorted new and legacy IT platforms
- Overlapping, redundant and incompatible transaction applications and management reporting systems

Future growth was likely to be hampered by the rate at which the enterprise as a whole could digest the acquisitions and optimize operations. Cicero technology provided a very rapid, effective way for the Enterprise IT organization to address these problems and produce measurable business results across the entire enterprise in three months while at the same time positioning the company for its new information architecture. Cicero made the transitions low risk, low cost, and highly effective.

### Inefficiencies, Cost and Customer Frustration

The company's public image and its position in the marketplace were being challenged by customer service perceived by the retail customer and internal users as substandard and unsatisfactory. Problems were especially serious and obvious in the company's many contact centers where hundreds of Customer Service Agents (CSA) were using more than 25 multi-featured enterprise applications to handle client inquiries, process new customer applications, and resolve claims from field producers, all in a highly competitive, cost-sensitive environment. Difficulties abounded:

- Customers who called the Company with questions outside a particular contact center's business function would be transferred to the appropriate contact center but often had to wait for the right agent to become available.
- Far too often, valued customers were instructed to hang up and dial a different toll free number to access the required expertise (and appropriate business applications) for their needs.
- This process frustrated customers and agents alike, adding to longer customer-handling times and increased costs to process even the most routine calls.
- Multi-faceted or complicated calls would then be routed to specialist contact centers via Genesys T-Servers with agents ideally handling multiple customer inquiries during a single phone call. While this approach helped CSAs to become



better equipped to handle the rising volume and diversity of customer calls, it increased costs, operational complexities, and customer complaints.

- Cumbersome and time-consuming practices significantly increased agent-training costs and reduced the time an agent would be available online and new agents faced a lengthy and complicated training cycle, often resulting in higher-than-acceptable turnover rates.

### The enterprise focused on integrating customer-facing and customer service applications as a major IT effort

The company' has a valuable IT portfolio included mainframe, client-server, CRM, desktop, mobile, and Web applications and highly sophisticated business processes that rely on them every business day. Changes to provide better application integration and smoother workflow had to be accomplished without risking mission critical business functions

Complicating the application integration challenges, the Company committed to a strategic, multi-year migration from its existing IT

portfolio architecture to IBM's WebSphere environment.

## Demanding Requirements

After lengthy analysis, the Company determined that the ultimate solution they desired would be characterized by:

- A user-friendly solution that would be well received by users and would generate greater customer satisfaction.
- A quicker and more effective way to train agents on multiple complex business systems while decreasing operational costs, training costs, and staff turnover.
- Smooth cross-platform integration of primary business systems, mission critical legacy applications, CRM systems, and Web portals with CTI.
- Reduced data entry cost including error correction and updates, and a measurable increase in productivity.

In order to meet all the requirements of its customer facing application challenges, the Company expended a great deal of effort and money investigating potential solutions. But nothing fit all the requirements until Cicero was discovered.

## The Cicero Unified Desktop Solution

After a lengthy and detailed evaluation process, Cicero was selected as the new enterprise development platform based on which the company's IT organization would create an integrated desktop workspace. This integrated desktop workspace would organize business applications according to task, present a common look and feel, and share data in a secure, context-aware manner.

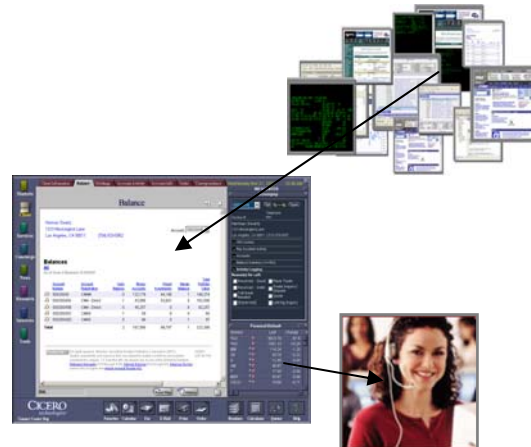
In an extraordinarily short time IT and Cicero, Inc. professionals created the Cicero desktop solution which integrated CTI, key business systems and numerous secondary applications in use in the contact centers and elsewhere within the Company.

## Across platforms

The Cicero solution included widely diverse host platforms:

- Mainframe
- client-server
- Web
- Windows
- Even MS-DOS!

A new service application was created that greatly simplified the agent logon process by collecting, managing, and securely storing user logon credentials. This service also enabled Cicero to automatically restart legacy applications that timed-out during a user session.



## Across applications

Applications integrated within the Cicero workspace included:

- Microsoft Windows
- MS Office and other desktop productivity suites and tools
- Mission critical 3270
- Midrange and client server applications
- Old IBM 360 applications
- Siebel CRM
- Oracle Forms
- Third-party packaged solutions for document management, call tracking, and Citrix
- Web-based applications

- Web Services and portals both internal and external to the Company

***Cicero, Inc. and the Company developed, tested and successfully deployed a Cicero-based integrated desktop workspace in eight weeks.***

## Key Enterprise IT Business Benefits

None of the Company's business applications and few processes were modified during development and implementation. Within a few months, the Company observed several key operational benefits:

- **Speedier development and deployment.** Cicero integration was much faster than traditionally packaged application integration solutions or middleware
- **Lower deployment and maintenance costs.** Due to Cicero's extremely powerful development environment (Cicero Studio) both original implementation and continuing support were easier and cheaper than legacy approaches
- **Generated Higher Customer Satisfaction.** As the Cicero solution was deployed, customers immediately perceived improved service, more accurate transactions, and much less irritation and frustration.
- **Minimized business and technical risks.** Because Cicero did not invade the internals of any existing application, there were no unexpected negative consequences
- **Additional flexibility and IT responsiveness.** Cicero technology, architecture, and development environment provide unequalled flexibility to add or change business applications and processes in an easy, consistent, enforceable and rapid manner
- **Much smoother computer telephony integration.** Cicero seamlessly integrated Genesys CTI with all required applications used within the Company's complex IT and contact center environment
- **Integration within the workstation.** Cicero managed to integrate a key 16-bit MS-DOS application into the work

environment - something that the Company could not achieve in any other way

- **Reduced need for an expensive big bang CRM initiative.** Cicero's "quick hit" made it possible for IT and the business units to address the complex decisions about CRM deployment with much less pressure, allowing the focus on the CRM system to shift from customer service to revenue improvement.

## Additional benefits

- Developers integrated any application that had a "footprint" in Windows into the highly flexible user interface
- Cicero provided rapid customization of the user desktop to specific roles, security requirements and job functions
- The Cicero technology allowed agents to personalize the Cicero desktop with shortcuts to frequently used applications and tools without impacting security or performance
- The integrated environment supported pop-up interfaces to multi-channel functions such as co-browsing, web, fax and instant messaging
- Cicero's Routines provided an efficient method of automating processes, training agents, increasing morale and improving productivity
- Cicero's InfoCenter provided real-time information to agents to better address customer needs
- Cicero's History tracking feature helped agents identify training and operational problems and quickly develop solutions for staff productivity, IT performance and cost containment

## Operational impact

In addition to the enterprise level benefits to the IT organization and the company as a whole, there were many improvements that were felt immediately at the day-to-day working levels of the organization.

**The job was easier.** Each CSA experienced substantially improved application ease-of-use as the Cicero solution was phased in. Agent

benefits included: reduced initial sign-on times; automatic restarts for timed-out legacy applications; reduced point-and-click navigation time to move between applications; reduced data entry time and data entry errors by data sharing between applications.

**The job was better.** The generally improved work environment for agents and their higher staff productivity, improved morale and job satisfaction and led to reduced turnover

**The job was more interesting.** Cicero integrated desktops enabled agents to handle many different types of calls, thereby reducing the number of costly call transfers and increasing customer satisfaction - while greatly simplifying staff scheduling

**The job was easier to learn.** Cicero's task-oriented, intuitive desktop with point-and-click navigation reduced training requirements and simplified use – new agents can be trained in Cicero desktop use in just one day

**The job was easier to understand.** Cicero's role-oriented user interface capability minimized business application training and the automation of many business specific tasks removed the requirement that agents learn the interior complexities of each application

**Exceptions were processed more accurately.** The implementation of Cicero technology made use of the Cicero *Routines* capability to: provide learning aids for new processes or less familiar application tasks.



## Key Results

- **Highly leveraged solution.** The enterprise IT organization solved a broad range of front-line operational problems with the deployment of Cicero integrated desktops.
- **Extraordinarily fast results.** The customer satisfaction metrics improved substantially and target ROI measures were reached within the first 6 months.
- **Safe changes.** Modest training requirements and extreme ease-of-use design made it possible to introduce change in nearly all parts of the company with minimum risk and disruption.
- **Outstanding success.** The solution provided credibility for the enterprise IT organization so that they could pursue their longer-range architectural overhaul with the full confidence of the business unit managers and senior executives.