



DAB Bank focuses on optimization in the CRM and BI upgrade

Abstract

Especially in banking, BI solutions are important management tools that enable decision making and the preparation of marketing campaigns based on facts. Up-to-date data and numbers are essential for the commercial success of a bank. It is crucial that data streams from various sources are managed correctly. The tool: Business Intelligence software, which also plays a strategic role at the DAB Bank. To be able to use the newest CRM and Business Intelligence functionalities, DAB Bank chose to upgrade to Siebel Customer Relationship Management (Siebel CRM) 8.1.1.7 with Computer Telephony Integration (CTI) as well as to integrate Oracle Business Intelligence 11g (OBI).

“We wanted a Business Intelligence solution that enabled simple access to all sources of information as well as lightning-fast analysis of all corporate areas. We are very happy with Oracle solutions and want to benefit from the functions and possibilities offered by Oracle Business Intelligence 11g.” Martin Schinharl, responsible for the IT Solutions department at the DAB Bank AG.

The client

DAB Bank (www.dab.com) offers consumers and independent asset managers innovative products and services related to investment, trading and banking. The direct bank is active in Germany and Austria through its subsidiary direktanlage.at. As of 31 December 2012, DAB Bank managed 597,128 clients company-wide with a fortune of 28.38 billion euros. The DAB Bank has its headquarters in Munich and was founded in 1994 as the first discount broker in Germany.

The challenge: unify and simplify

The DAB Bank already relies on Siebel CRM 7.8 for Customer Relationship Management and works with a BI solution from SAP. The direct bank wants to simplify processes even more. This should enable every user to adapt processes without the help of the IT department. It is planned to integrate the SAP-based BI solution into OBI 11g after the Siebel upgrade. The advantage of OBI 11g: users can access data in a uniform environment, independent of whether the data stem from relational, OLAP or XML data sources.

The project scope and procedure for the upgrade were clearly defined in the Proof of Concept by Riverland Reply. Obstacles during the project were easily overcome together with the IT department in the DAB Bank. “The cooperative efforts of the customer are very important in projects like this. There are always unpredictable constellations. However, years of experience in consulting, such as we have, result in a high degree of flexibility,” says David Dempsey, Managing Director of Riverland Reply.

The benefit: upgrade improves ad campaign management

The staff today benefits from the use of the new reporting, visualization, search and collaboration functions offered by OBI 11g. This software offers connection possibilities that were previously unavailable. The ad campaign management optimized by the CRM update benefits DAB Bank advisors: they can create individual customer offers and marketing channels and then check the effectiveness of their actions. Martin Schinharl emphasized: "With the introduction of Oracle BI 11g, the DAB Bank now has a BI platform that can also be used without Oracle CRM and can serve as a platform for the unification and consolidation of the BI system architecture.

With the upgrade project the customer now has the possibility of going a step further and migrating the SAP BI solution into the Oracle BI 11g Siebel Analytics. If the DAB Bank does decide to do this, two independent repositories will have to be merged into one and, finally, the user administration will have to be redefined. "In the course of the harmonization, a unified authentication system is important," said David Dempsey, Managing Director of Riverland Reply. He recommends an LDAP server for the future so that the users will not require two different passwords for a CRM query for transactional and analytic data.

The responsible parties will benefit from easier maintenance and development of the system based on the homogenization of the server architecture and the BI systems on the Oracle Business Intelligence 11g platform. Furthermore, the LDAP authentication would simplify IT rights management for everyone concerned. Good perspectives for the DAB Bank - not only for sales and marketing.

The IT staff at the DAB Bank is not only happy with the progress of the project, but also with the collegial cooperation with the Oracle partner: "The results prove that we made the right choice with Riverland Reply. The project has been implemented competently and affordably. Our next steps together have already been determined: these include the refinement of the use of the customer master data and project administration in the Siebel CRM," said Schinharl.

Why Oracle

The DAB Bank has been using Oracle/Siebel technology in their customer relationship management for years. The positive experiences with Siebel CRM 7.8 were key factors in the selection of Oracle for BI as well as for upgrading to the current version. Above all, the easy to operate Business Intelligence solution from Oracle - OBI 11g - and the compatibility with the Siebel CRM won over the direct bank.

Why Riverland Reply

The consulting company Riverland Reply, part of the Reply Group and headquartered in Munich, specialises in technical consulting, implementation and system integration in the fields of processes, business solutions and technologies.

Riverland Reply has proven to be a strong partner in the implementation of Oracle solutions at the DAB Bank and was also able to win over the latest call to tender. The Oracle partner first created a Proof of Concept (POC) for the direct bank and scored points with an attractive fixed price offer. "We selected Riverland Reply because the company has a very good reputation as a systems integrator in Oracle consulting. The team won us over in the tender phase with the high degree of expertise and flexibility," said Martin Schinharl, Head of the IT Solutions department at the DAB Bank.

Riverland Reply is a Reply Group company specialised in technical consulting, implementation and system integration in the process, business solution and technology area. The core competences of the company include, among others, Customer Relationship Management and Business Intelligence. Riverland Reply develops and implements tailor-made versions of Oracle solutions in these areas.

For further information: www.reply.de

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