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West Corporation Case Study: Cutting Edge Analytics in the Age of Marketing

Mike Moore

Director Product Management
West Corporation



Cathy Pendley

Senior Consultant
Vlamiis Software Solutions





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Mike Moore

- Director of Product Management, West Corporation, Alerts & Notifications
- Proactive customer communications, business intelligence and customer analytics
- 5 years experience as an analytics manager at West
- 10 years of automated customer communications experience including data analysis, voice user interface (VUI) design and usability analysis





West Corporation is a leading provider of technology-driven, communication services, serving Fortune 1000 companies and other clients in a variety of industries, including telecommunications, retail, financial services, public safety, technology and healthcare.

OUR COMPANY

Founded: 1986
Revenue: \$2.49B₍₂₀₁₁₎
Headquarters: Omaha, NE
Employees: ~36,500
Locations: 43

COMPANY HIGHLIGHTS

- World's largest conferencing provider (InterCall)
- Nation's leading provider of emergency communications (Intrado)
- Premier provider of customer contact solutions
- Leading provider of automated alerts & notifications
- Leading provider of automated voice solutions
- Leading provider of accounts receivable management solutions





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Fortune 500 Companies Choose West Corporation

100% of the **Fortune 10**
use West Corporation

85% of the **Fortune 100**
use West Corporation

82% of the **Fortune 500**
use West Corporation

9

of the Top 10

Commercial Banks

9

of the Top 10

Healthcare Companies

8

of the Top 10

Insurance Companies

10

of the Top 10

Pharmaceutical Companies

7

of the Top 10

Retail Companies

10

of the Top 10

Telecommunications Companies

7

of the Top 10

Utility Companies



West Alerts
and Notifications

*According to Fortune's 2011 ranking of America's largest companies
**Companies represented use one or more of West Corporation's service(s)
***Data was matched with 2010 West Corporation client list





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Cathye Pendley

- Consulting Director for Vlamis Software Solutions
- Implementing Oracle Business Intelligence systems since 1993
- Lead project teams through full-cycle of projects
- Speaker at Oracle Conference





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Vlamis Software Solutions, Inc.

- Founded in 1992 in Kansas City, Missouri
- Oracle Partner and reseller since 1995
- Developed more than 200 Oracle BI systems
- Specializes in ORACLE-based:
 - ✓ Data Warehousing
 - ✓ Business Intelligence
 - ✓ Data Transformation (ETL)
 - ✓ Web development and portals

Why Vlamis?

- Award winning authors and educators
- Aggressive adopters of the latest technologies
- Connected with Oracle product management and developers
- Efficient implementers by working offsite to reduce costs
- Team-oriented collaborative approach
- Respected reputation for ethical business practices





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Overview

- Learn how West Corporation is enhancing their ability to provide world-class, **best-in-breed proactive customer communications** with the Oracle 11g Database, Oracle OLAP, and OBI Foundation Suite.
- Learn the keys to a **successful data warehouse implementation** with Oracle OLAP and OBI Foundation Suite
- Learn how to **optimize** a data warehouse design for business objectives





What is Proactive Engagement?

Proactive communications is a vital corporate strategy to enable client engagement with a targeted audience virtually through message, brand and/or experience.”

- **Proactive engagement** communication to a targeted audience
...will be one of the **single most important** corporate initiatives of the future to drive message, brand, experience and therefore business growth

...is achieved by the realization that **contacting customers the way they want** with personalized, relevant and context aware data results in customer intimacy and therefore holds extraordinary value
- When providing the **right customer experience**, a client maximizes customer engagement and seizes opportunities to drive more brand revenue and higher customer lifetime value



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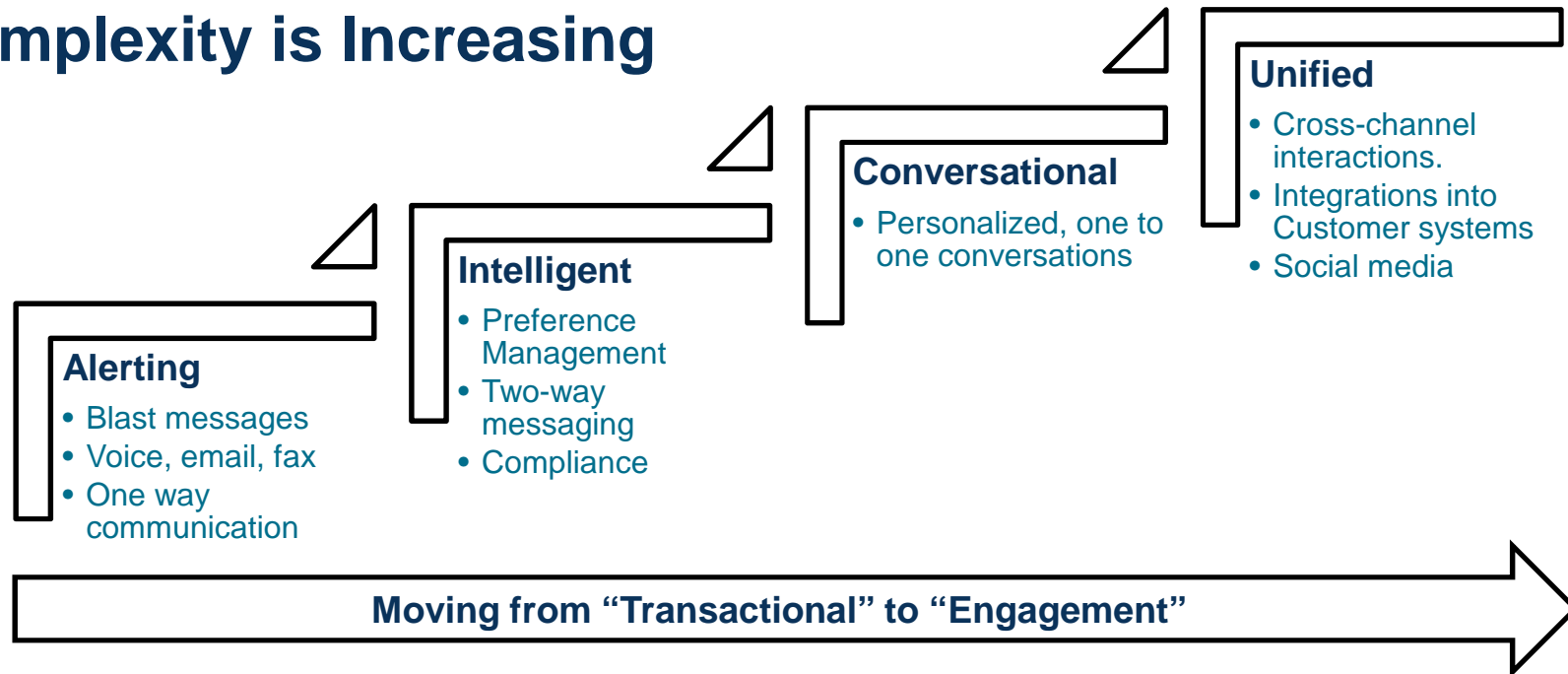
Industries Using Proactive Engagement

- **Financial Services**
 - ✓ Collections & Payment Reminders, Low Balance Alerts, Transaction Confirmations & Fraud Alerts
- **Healthcare**
 - ✓ Appointment Reminders, Disease Management Programs
- **Pharmaceutical**
 - ✓ Prescription Refill Reminders & Adherence Programs
- **Utilities**
 - ✓ Outage alerts, Disconnect notices, Start/stop/transfer confirmations, Prepaid reminders
- **Travel & Entertainment**
 - ✓ Flight Status Notifications, E-Fare Notices, Package Offers & Reward Program Updates





Complexity is Increasing





Customer Expectations are High!



Do you know me?

- Who am I?
- What did I call about?
- What help do I need?
- What do I need to know right now?



Do you know how to talk to me?

- Voice
- Email
- SMS
- Web



Do you now when to talk to me?

- Now?
- Time of day
- Day of the week

My Space... My Way... My Time ...



Key Features and Functionality

- **Data Storage & Integration**

- ✓ Centralized, conforming data across the A&N enterprise
- ✓ Normalized internal data
- ✓ Use 3rd party data to gain an end-to-end view of customer experience
- ✓ Use data from multiple source to develop personalized, context-aware communications strategies

- **Reporting, Dashboards & Scorecards**

- ✓ Standard reporting with drill down & user customization
- ✓ ROI tools that consistently & accurately communicates value
- ✓ Scorecards and benchmarking tools to track & measure progress



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Key Features and Functionality

- **AD Hoc Query & Analysis**
 - ✓ Facilitates timely performance optimization analysis
 - ✓ Enables end-user ask questions of their data without IT support
- **Data Mining & Predictive Modeling**
 - ✓ Personalize customer treatment strategies based on explicit customer preferences and implicit customer behavior and attributes
 - ✓ Predict future events & trends & their impact on the business
- **Analytics Packages with Accelerators**
 - ✓ Pre-built accelerator models for specific vertical markets & notification & alert types
 - ✓ Customizable based on customer behavior
 - ✓ Enhanced with client & third-party data



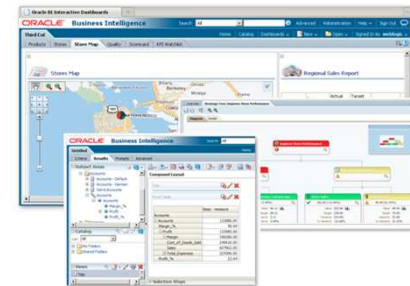
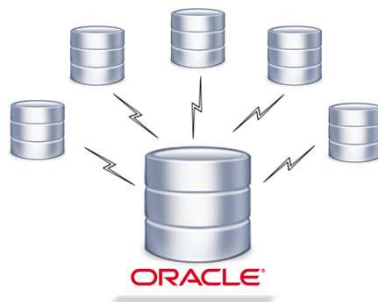
Executive Support is Critical

- **High visibility** and involvement at the senior level
- Whenever we needed additional resources we found them
- We decided to train our people in some areas instead of partnering due to budget needs
- Our consultant is training our resources to self-sufficient



Oracle 11g Database, Oracle OLAP & OBIEE

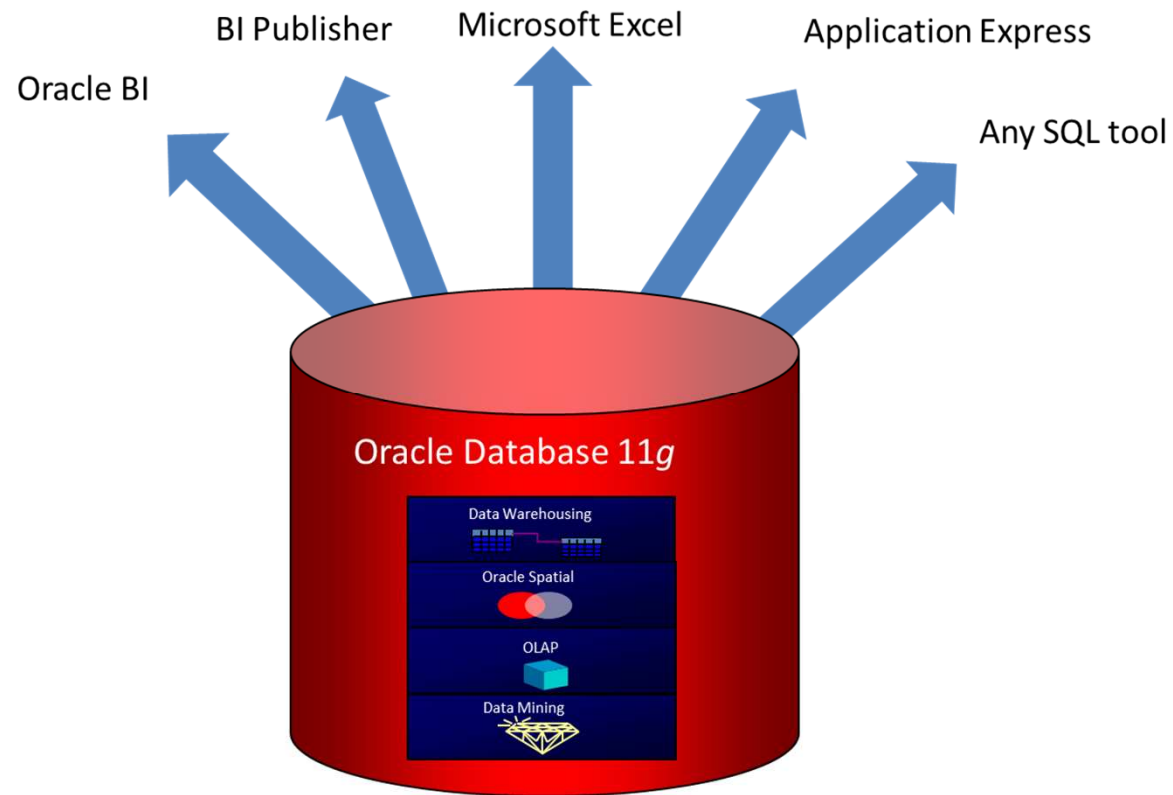
- Multidimensional analytical capabilities required
- Performance, scalability, time series analysis & “slice & dice” critically important
- Security and encryption required
- Web based, OBIEE front end
- Visualizations important
- Needed robust dashboard and ad hoc capability
- Needed to be able to handle multiple clients and internal analysts





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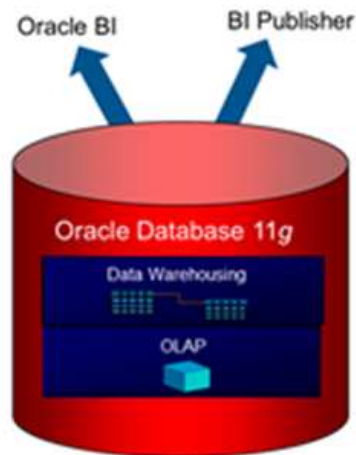




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Technology Focus – Phase 1



Data Warehouse with Oracle Business Intelligence Reporting

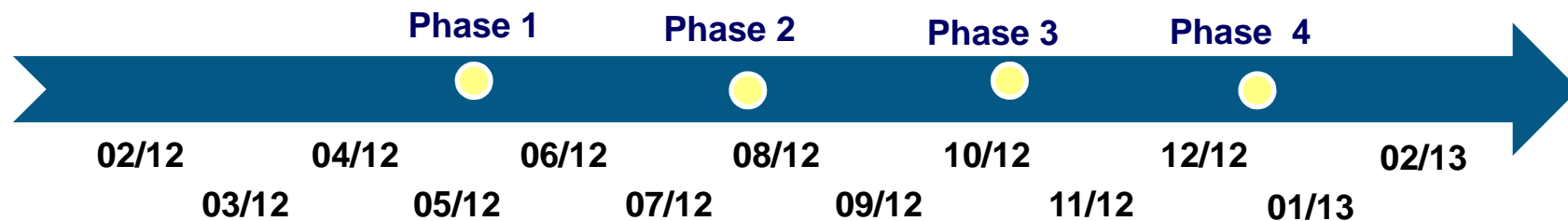




Project Timeline Overview

The project is broke out into four phases and is scheduled to be completed December 2012:

- Phase 1 - Subset of commercial clients
- Phase 2 - Remainder of commercial clients
- Phase 3 - Healthcare clients
- Phase 4 – Utilities clients





Project Team

ETL (Extract Transform Load)

- Responsible for taking the data from the source systems then converts/transforms the data so it can loaded into the data warehouse.

Data Architect

- Builds the data model and meta-data for Oracle Business Intelligence Enterprise Edition (OBIEE).

Oracle DBA (Database Administrator)

- Responsible for general database performance, maintenance, and security.

Project Management

- Build and monitor the project plan to mitigate the risks and avoid delays.

Super User/Client

- Builds the OBIEE reports, uses the system for analysis, provides feedback to technical team

Executive Sponsors

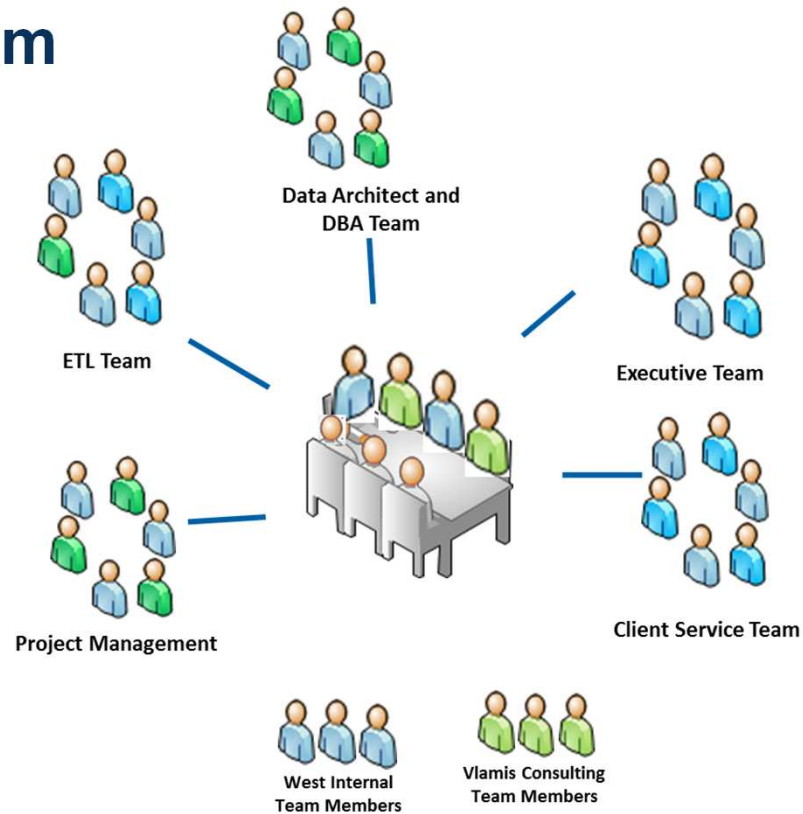
- Upper level management that have a vested interested in the success of the project.



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Phase 1 Project Team



west West Alerts
and Notifications

 **vlamis**™
SOFTWARE SOLUTIONS



Phase 1 Focus

1.5 Million Records loaded daily into staging via ODI

- Common data combined

Data is loaded into the data store/fact tables

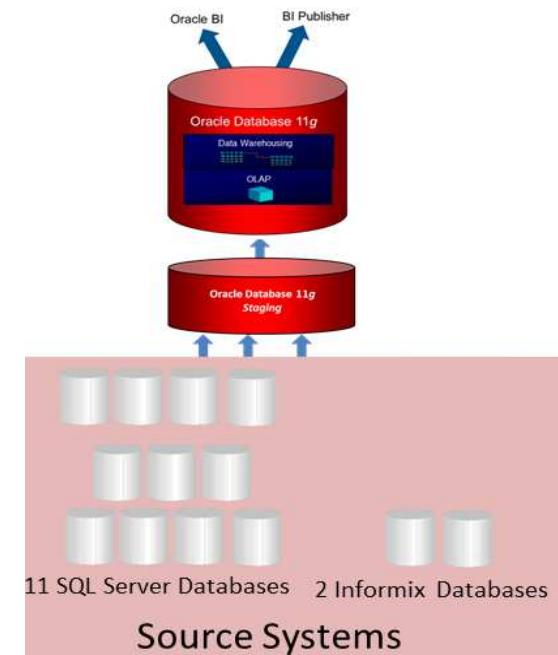
- Data is stored down to the time of day (seconds)

Summary Data / Dimension Tables

- A summary view is created to store aggregate data
- Dimension tables are built to support dimensional reporting

OLAP Data

- The summary data is loaded into the Oracle OLAP cube and used for reporting in OBIEE.





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Project Timeline

September

- Project approved by upper level management
- Project management team began working on the project

October

- Requirements gathering started

November

- Key data architect left West
- Completed requirements document
- Data model started

December

- Data mapping started
- Identified internal resource needs





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Project Timeline

January

- Identified internal project team
- Began putting project team in place

February

- Project team in place
- Trained project team on ETL tool (Oracle Data Warehouse)
- Software installed and security issues addressed

March

- Data warehouse and cube build started
- ETL process kicked off

April

- Data warehouse and cube build completed for initial reporting
- OBIEE meta data and report build started





Responding to Challenges

Risks	Mitigation
Loss of key resource	Backed filled with internal resources
Deliverables date slip	Project manager quickly act to get the project back on track
Lack of in-house expertise	Added internal project members with similar experience and hired consultants to train and mentor.



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Key to the Success

Upper level management support

Some with the clout get the resources you need (money and staff)

Project management from the beginning

Working jointly with consultants

Taking advantage of consultants expertise while keeping as much of the ownership of the project as possible

Start Small

Phased approach



A large crowd of blue cartoon figures, each with a round head, two small eyes, and a simple body. One figure in the center-right is yellow, standing out from the rest. The background is a solid blue color.

My space...
My way...
My time...



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