



Sybase's Data Warehouse Solutions Showcase

For Customer Relationship Management

and Customer Intelligence

“Many businesses are trying to examine the drivers behind customer activity. Understanding complex customer relationships often requires benchmarking huge volumes of enterprise and third-party data as well as preparing the data so that marketing professionals can slice and dice information in an almost infinite number of ways. These requirements of customer relationship management present significant challenges for most enterprise environments. Sybase’s solutions are well suited to customer-oriented applications. We are not surprised at the number of companies that have developed their sales and marketing applications on Sybase.”

Bob Moran, Director of Decision Support Research, Aberdeen Group

Welcome to Sybase's Data Warehouse Solutions Showcase for Customer Relationship Management and Customer Intelligence, featuring a variety of customers who use our technology, partnerships, and professional services for successful customer relationship management. If you're considering a data warehouse implementation for your organization, we invite you to review this "at-a-glance" showcase of Sybase® real-world implementations—innovative business solutions yielding stronger, more profitable customer relationships.

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Your Goal: Attract and Retain Customers

It takes more than great products to attract and retain customers today. It takes a great customer relationship management strategy.

An effective strategy doesn't simply improve how your customers feel about your company. Rather, it dramatically increases what you know about your customers—what products they are interested in, what types of promotions they respond to, which customers are most profitable for you and why, and which of your customers have abandoned you for the competition and why. It's all about knowing your customer.

Customer relationship management (CRM) is not a new concept—that is, managing customer relations for continued business and increased revenue has always been a high priority for effective sales forces. But today's new technologies enable a comprehensive CRM knowledge base that includes all your customer "touch points" from sales, marketing, and customer service relationships. With a well-designed CRM strategy, you can integrate sales, marketing, and customer operations to build a knowledge-enabled sales force, generate highly effective marketing campaigns, and deliver exceptional customer support. This new capability will result in shorter sales cycles, higher response rates, increased customer loyalty, and an overall increase in profitability.

Customer knowledge starts with information—but consider the many forms of information maintained by business in the computer age. Your company most likely maintains data in a morass of operational systems to support regional sales, customer profiles, inventory, and the results of direct mail campaigns. In this form, your data is often cryptically described and inaccessible to all but a few in the individual departments that acquire and maintain it. Data warehousing and CRM techniques allow you to convert this "mystery data" into a library of accessible knowledge. CRM allows you to apply organization, consolidation, description, meaningful business terminology, and easy data access so that your information becomes knowledge. In turn, this new knowledge will help you spark reactions from your customer base and send your sales numbers and profitability sky rocketing.

Consider the ways your company might benefit from CRM:

- Develop marketing campaigns with unheard-of response rates.
- Determine exactly who your sales people should be calling, and why.
- Know which customers to keep, which to let go, and whom to go after.

Success Starts with Sybase

Sybase can help you implement a successful CRM strategy that makes the most of your existing data resources, wherever and however your data resides. We are the leader in converting distributed, disparate data sources into easily accessible knowledge sources for business decisions. By combining our industry-leading data warehousing, Web, and mobile and embedded computing technologies with our world-class professional services and partners, Sybase is uniquely suited to serve as your foundation for CRM applications. We'll help you turn years of customer, market, sales, and product data into a consolidated, strategic tool for business growth.

Sybase CRM solutions offer:

- **A Single View of the Customer**—Organizations can draw from and synthesize updated information from across different business units or regional offices, no matter how distributed or heterogeneous their technology infrastructure.
- **Ability to Dynamically Explore**—Sybase's data management and data warehousing technologies enable users to explore and analyze data dynamically, so end users can ask the questions they need and get the answers—when they need them.
- **Information Anywhere**—Platforms ranging from laptops to desktops, from PC servers to mainframes can be integrated for easy data access and exchange, whether your users access the system from the corporate office, regional offices, the Web, remote laptops, or handheld devices.
- **World Class Professional Services**—Sybase Professional Services, with its staff of more than 1,300 professionals worldwide, provides customers with all the help they need, from project management to full-scale development, including collaboration with any of hundreds of system integrators and turnkey solutions providers.

Sybase Delivers the Competitive Edge

The leading companies in the highly competitive telecommunications, financial, insurance, and healthcare industries rely on Sybase to help them better manage their customer relationships. Their business-critical solutions include applications for customer churn, risk analysis and prevention, patient services, customer service, and sales force automation.

Who are the companies that rely on Sybase data management products?

- 70 of the top 100 global banks
- 7 of the top 10 managed care organizations in the U.S.
- 19 of the top 25 U.S. insurance companies
- More than 350 healthcare companies worldwide
- 125 telecommunications companies

In the customer vignettes that follow, you'll see why organizations are turning to Sybase for improved profitability through data warehousing solutions. When its time to build your own strategic customer relationship management solution, consider the experience and capabilities that Sybase offers.

For more information on CRM and Sybase data warehousing solutions, call 1-800-8-SYBASE.

Or visit our Web site at www.sybase.com/datawarehousing/

“Sybase was our first choice for the data warehouse because of the company’s open systems architecture.”

Katty Conrard
Project Manager, Information Systems Division, BIL

Banque International à Luxembourg

Superior customer service produces customer loyalty in a climate of global competition

Business Issues

- Analyze product line performance
- Target marketing to specific customer groups
- Customize service at point of customer contact

Technical Issues

- Multiple data sources—Adabas, DB2, external data, departmental data
- BIL new to data warehousing

Business Results

- Ability to track product sales by branch and by customer
- More focused customer service

Technical Results

- Quick extracts with minimal impact on operations
- Project delivered on time and on budget

Established in 1856, Banque Internationale à Luxembourg (BIL) is the country’s oldest banking institution and remains one of its most active and important. Over the years, BIL has played an active role in the development of the Luxembourg economy, and it is a founding member of the Luxembourg Stock Exchange. Additionally, the bank has built up an international presence with offices throughout Europe, the Far East, and North America.

Recognizing the importance of customer service and loyalty in winning against global competition, BIL has embarked on a CRM solution for its Retail Banking Division. This solution now provides managers faster access to comprehensive customer data and helps them better serve the financial requirements of their customers. As well as advancing BIL into a new era of relationship marketing, the initiative is helping the bank analyze product line performance and evaluate customer profitability.

The planned CRM initiative revolved around a data warehouse infrastructure. Because BIL had multiple data sources—main operational system, annex systems, and external information that needed to be integrated, including Adabas and DB2 on IBM MVS—the systems architecture of the data warehouse was key. Yet BIL, like many companies today, did not have the in-house data warehousing expertise to deliver the solution they needed.

BIL turned to Sybase to deliver a system that provided accurate and complete information about each customer. Now BIL’s staff is better equipped to provide financial advice and strengthen relationships. From a business perspective, the bank is able to initiate targeted marketing campaigns to specific customer groups and sell more products and services. With the new system, BIL can assess which of its financial product lines are most profitable and determine which criteria make some customers more valuable to the bank than others. Being able to analyze activities in this way allows the bank to focus on activities offering the greatest return.

BIL chose to run Sybase Adaptive Server® Enterprise systems at the heart of the data warehouse and enlisted the help of Sybase Professional Services. The first Adaptive Server Enterprise database acts as the staging database, or operational data store, and the other holds the physical data warehouse. Using a staging database, BIL can now extract data quickly with minimal impact on the operational systems. It has a single input to the data warehouse, and it can separate the two functions of populating and accessing the data warehouse.

“Data warehousing was one of the most important tools we exploited to win our number-one position.”

Lucien Costa

Manager of Enterprise Information Systems and Data Warehousing, Telecel

Telecel

Portugal’s market leader in mobile telecommunications attributes its phenomenal success to focusing on the customer

In 1991, Telecel was granted a license to become Portugal’s second mobile telecommunications supplier. In a market set to become increasingly deregulated, the company launched itself into a race to take the number-one position in the market. The national monopoly had a three-year head start in the mobile business and was working to secure its leading position against both Telecel and a rumored third competitor.

Since Telecel was a private company starting from the ground up, it decided to focus on the customer and compete on quality of service and innovation. “The only way to exploit the market quickly and effectively is to know how your business works, down to the finest detail—to know what your customers are responding to, what they are buying, which products are most profitable, how effective your channels are, what the geographic differences in sales are, and so on,” said Lucien Costa, Telecel’s manager of Enterprise Information Systems and Data Warehousing.

Before implementing the data warehouse, Telecel generated all of its reports in COBOL. While these reports were very time consuming, they were essential to the success of the company. Inevitably, Telecel hit an insupportable backlog and was using too much valuable developer resource. Telecel tried implementing Microsoft Access, but outgrew it in only three months. Additionally, Telecel was maintaining a complex, multiple database

environment including Informix, Oracle, and Sybase.

Telecel could never have foreseen its rate of growth. The results are testimony to the success of Telecel’s strategy. When the company was launched in 1992, the business goal was to break even in about six years. Telecel broke even in only three. Since then, revenues have doubled year after year. As a result, Telecel overtook the incumbent mobile operator two years ago, in numbers of customers, in revenue, and in profitability.

Telecel chose Sybase to supply the connectivity and performance it needed. Using Sybase products, Telecel was able to integrate its multiple disparate data sources and feed the data warehouse in real time. Additionally, Sybase gave Telecel a way of implementing dimensional analysis for highly complex ad hoc queries against very large volumes of data. Queries that previously took three to four hours to run are now taking three to four minutes. “We have half a terabyte of data supporting 30 staff running complex ad hoc analytical queries, 50 users running canned reports, and all customer service staff accessing customer profiles in the data warehouse through a browser-based system. This removed the need for us to purchase a copy of Microsoft Access for every customer service person.”

Business Issues

- Reduce churn
- Identify the most profitable products and highlight the need for new products
- Target most profitable customers

Technical Issues

- COBOL reports were time consuming
- System used too much developer time
- Multiple disparate data stores

Business Results

- Broke even in half the expected time
- Doubled revenue year after year
- Overtook the competition

Technical Results

- Integrated disparate data sources
- Gained ability to perform ad hoc queries on large volumes of data
- Improved response time
- Browser-based support

“We’ve seen a 50 percent reduction in our mainframe costs overall, and that has allowed us to realize an ROI on the project in the first 12 months.”

Michael Lutz

Principle and Director, Strategic Planning and Information, PHH Vehicle Management Services

PHH Vehicle Management Services

Improving responsiveness and quality of client services

Business Issues

- Improve productivity
- Reduce costs
- More accurately position service advantages

Technical Issues

- Provide fast, flexible, up-to-date data access
- Integrated legacy and enterprise-wide data
- Internet access to customers

Business Results

- Improved customer service
- Capitalizing on up-sell and cross-sell opportunities
- A 50 percent reduction in overall mainframe costs
- 12 month ROI

Technical Results

- Reports generated in a fraction of the time
- Flexible client access from Web-based reporting analysis tools
- Real-time updates ensures timely data

PHH Vehicle Management Services is a leader in vehicle fleet management and card payment services. PHH has more than half of the Fortune 1000 as clients, with more than 750,000 vehicles under management and more than one million of its service cards in use. With five decades of creativity and experience in managing the complex tasks associated with acquiring, managing, and reselling vehicles, PHH is focused on meeting its clients' multiple business needs.

PHH has a reputation for developing innovative business solutions. It founded the fleet management industry and invented most of the products and services that are now standard. With the constant goal of improving productivity while delivering enhanced services to its clients, PHH sought a way to reduce analytical reporting costs and shrink turnaround times, while increasing reporting flexibility and timeliness. A top priority was to deliver greater value from its management services than its competition. Costs were a critical factor, and management needed a solution in 12 months—a substantial challenge.

PHH realized the value of the data it had in many of its legacy systems and wanted to tap the potential of that data. Faster, more comprehensive reporting through the use of new technology was a priority. PHH envisioned a data warehouse that could provide fast, flexible, up-to-date data access for hundreds of internal users as well as clients via the Internet.

PHH designed its Sybase Web-enabled data warehouse to deliver online management capabilities and insightful, ad hoc information analyses. PHH tracks client information in the categories of vehicle financing, maintenance, title and registration, safety and accident management, fuel usage, and card payment systems. Clients use this information to understand total costs, enforce policies, and plan budgets. By benchmarking against other companies in their industries, clients can identify opportunities for cost savings and productivity improvements. PHH can also use this information to take advantage of up-sell and cross-sell opportunities. For example, when PHH detects a high accident rate for a particular client, they can propose safety training or other services that will help cut the number of accidents and dramatically reduce costs.

PHH's Sybase solution takes advantage of a more than half-terabyte Sybase Adaptive Server Enterprise data warehouse. Sybase's data movement technology is critical to providing real-time updates from PHH's mainframe enterprise systems, in addition to nightly/monthly extracts from legacy systems and external databases. PHH delivers its core data to Web-based reporting or analysis tools. Reports that used to take hours to run on legacy systems now return results in minutes. Through advanced data access, analysis, and distribution of information to users and clients, PHH has enhanced its industry position as a technology leader and fleet management partner.

“Queries used in developing targets for marketing campaigns that used to take six hours using SQL Server® 11 now take 48 seconds using Adaptive Server IQ.”

Carl A. Touchie
Senior Manager, Electronic Financial Services, Bank of Montreal

Bank of Montreal

Marketing campaigns, customer service, customized products—with greater than 100 percent ROI

Founded in 1817, the Bank of Montreal is Canada’s first chartered bank and acted as Canada’s Central Bank until 1935. Once a recently announced merger with the Royal Bank of Canada takes effect, the new bank will become one of the top 25 banking institutions in the world, with more than 90,000 employees in 3,000 branches and offices in more than 35 countries.

With the recent wave of mergers and acquisitions, banks face increased global competition. In the credit card area, this competition means customers are deluged with credit card offers from various banks. The Bank of Montreal’s Electronic Banking Services division is successfully responding by distinguishing its credit card offerings, retaining the right customers, and maximizing customer profitability with the help of a new CRM application that allows the credit card division to perform sophisticated analyses to obtain a more complete picture of its customers’ preferences, risk, and profitability to the bank.

When Bank of Montreal first began planning its CRM solution two years ago, the bank and its marketing efforts ran entirely on a mainframe system. Sybase data warehouse practice consultants determined that the initial system would take existing operational data from an authorization system and a general ledger system on a DB2 mainframe, as well as nightly extracts to a staging area on a Sybase SQL Server 11 database, and roll that

data into an Adaptive Server IQ database once a week. This allowed program teams to analyze the information on an ad hoc basis by segmenting customer behaviors.

Armed with this information, the bank developed an approach to retain these customers and to maximize their value through better customer service and customized product offerings. It now targets marketing campaigns at the portion of the customer base that generates the majority of profits. And it better manages risk by setting appropriate fees and payment plans. The impact on the business has been dramatic. The bank’s credit card business return on investment has been more than 100 percent with a project payback period of less than two years.

The Sybase data warehouse practice was able to get the system up and running within four months. The new system has also been able to reduce the time it takes to launch a new direct mail campaign from six to eight weeks to three weeks. Marketing campaigns are more frequent, more accurate, and more effective—with response rates two to three times those of traditional campaigns.

Business Issues

- Identify and retain the most profitable portion of the customer base
- Attract new customers with similar profiles
- Increase the overall effectiveness of marketing programs
- Increase overall profitability

Technical Issues

- Access to multiple information systems

Business Results

- Internal rate of return (IRR) of 100+ percent
- Payback period of less than two years.
- Average card volume up 59 percent
- Average card balances up 129 percent
- Market share up by more than 60 basis points.

Technical Results

- System up in four months
- Queries take a fraction of the time that they used to

“Because of the complex nature of their inquiries and the sheer amount of data involved, we were convinced that Sybase Adaptive Server IQ was the ideal solution for them.”

Glenn Peipert
Senior Vice President, CSI, Inc.

CSI/MovieFone

Ticketing service seizes market opportunity with Sybase technology

Business Issues

- Make information more easily available in-house
- Market the information collected

Technical Issues

- Large amounts of data
- Ran on desktop database
- Unable to perform ad hoc queries

Business Results

- New source of revenue for the company
- Increased marketing capability

Technical Results

- High-performance data analysis
- Increased ad hoc query performance
- Rapid development
- Compressed data
- Low maintenance

MovieFone, Inc. is the nation's largest movie listing guide and ticketing service, providing interactive telephone information, advertising, and teleticketing services to the motion picture industry and moviegoers. Through its 777-FILM phone line and MovieLink Web site, it provides moviegoers with listings for more than 14,000 movie screens in more than 30 markets nationwide. MovieFone just received its 300 millionth call and hosted its 30 millionth user session on the Web. In a single week, the company has handled as many as 3.7 million users.

MovieFone provides information to callers on what movies are playing at what theaters at what times, as well as on coming attractions. As it provides this information, it gathers a great deal of data on customer demographics, movie and theater preferences, purchasing patterns, and promotions to which customers have responded. All this valuable information provides a real opportunity to MovieFone. To market the service as a new product to movie exhibitors and producers and to make this information more easily available in-house, MovieFone turned to Sybase and Sybase partner CSI, Inc.

MovieFone needed to maintain the volume of data it collected, with the ability to query it quickly and generate a variety of reports. At first, they used a desktop Clipper database to collect and store their data and to generate reports. But because this was a desktop system, some of those reports would have to run overnight or longer to complete.

Furthermore, they were unable to perform ad hoc queries. To maximize the value of its data, MovieFone knew it needed to move beyond PC-based systems—and it needed to do so without any in-house IS expertise.

Sybase introduced MovieFone to its partner CSI to help plan and implement a desktop data mart that would provide organization and ease of access to the data MovieFone collected daily. Now, with its new data mart and the information it collects and maintains, MovieFone has found a new source of revenue for the company and it has increased its marketing capability. Increasingly, studios are turning to MovieFone as the way to maximize market share. By advertising to callers at the moment they are deciding which movie they will see, studios are able to steer more prospective viewers toward their featured films.

The Sybase solution CSI implemented was designed for high-performance data analysis while efficiently supporting large numbers of users. Sybase's patented storage technology greatly reduced their data storage requirements. And besides doing weekly loads, the system is essentially maintenance free—an absolute requirement, since MovieFone doesn't employ the kind of in-house IS expertise required for a traditional relational database system. Best of all, the development and deployment of the turnkey data mart required less than 120 days from start to finish, compared to an industry average of six to 12 months.

“The system runs very smoothly and is completely automated; IQ is a very stable product.”

Madalyn Hanley
Project Manager, Data Warehouse, KeySpan Energy

KeySpan Energy

Leading utility improves marketing process

On May 29, 1998, the KeySpan family of companies, including the Brooklyn Union Gas Company, combined with the Long Island Lighting Company (LILCO) to form KeySpan Energy. At the time of the merger, Brooklyn Union had been in existence for more than 100 years and had grown to provide natural gas service to 1.1 million customers in the New York City boroughs of Brooklyn, Queens, and Staten Island. For nearly as long, LILCO had served Nassau and Suffolk Counties in Long Island and had almost half a million gas customers. Building on a tradition of progress, KeySpan now offers a wide range of products and services, which provide cost-effective energy choices for residential and commercial customers.

Prior to the merger, Brooklyn Union sought to develop new ways to target specific customers for marketing campaigns, determine new business prospects, and grow and expand the business in a highly saturated service area. In the fall of 1997, the company turned to Sybase to build a Customer/Marketing data warehouse allowing them to view their customers in a way they had previously been unable to do. This launched a project team with the objective to merge external demographic, lifestyle, and other data with the existing customer base.

Their team's first step was to bring Sybase in-house and conduct a proof of concept. Having already developed a successful, financial data warehouse that had been running on Sybase for three years, the team felt that Sybase was the obvious choice for the marketing data warehouse. “What we weren't sure about was whether to go with IQ or not,” said Madalyn Hanley, Project Manager. “What we discovered was that Sybase IQ indexed everything, thereby providing extremely fast response times and unique views of the data.” Brooklyn Union now had an improved way of looking at the marketplace. By examining external and internal data, Brooklyn Union has become more aware of customers needs, wants, and preferences.

Since the merger, the company has used the data warehouse to identify potential customers in Long Island, which is predominantly an unsaturated market, and to market more aggressively, forecast growth goals, and generate a marketing plan for this area. The company's business clients, as well, are extremely satisfied with the warehouse. “With the warehouse in place, we can query the data in a multitude of ways,” said Frank Mott, Director of Marketing Intelligence. “We get updated information on a regularly scheduled basis and in a fully automated environment. Our data needs were met from the beginning to the end of the marketing process.”

Business Issues

- Find new ways of looking at market segments in order to grow and expand business opportunities
- Determine new business prospects
- Target specific customers for marketing campaigns

Technical Issues

- Whether to choose IQ
- Improve response times
- Provide unique views of the data

Business Results

- Understand customers needs, wants, preferences
- Strengthen customer support
- Market more aggressively
- Forecast growth goals
- Manage expansion in new territory

Technical Results

- Data can be queried in a multitude of ways



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