

# Insperty's On-Premise CRM (Siebel) & Oracle Service Cloud (Right Now) Integration

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Insperty is full service HR solutions provider for small, medium and mid-size companies.

Insperty provides a wide range of business performance solutions. Insperty provide premier Workforce Optimization solution as well other offerings like Human Capital Management, Payroll Services, Time and Attendance, Performance Management, Organizational Planning, Recruiting Services, Employment Screening, Financial Services, Expense Management, Retirement Services and Insurance Services.

Our customer relationship management and Business Intelligence applications cater contact center, service center and various other functional areas like Finance, recruiting etc. They provide Insperty Service personnel access to customer profile and related data in a centralized location to more effectively respond customer requests. CRM/BI System is providing customers and work-site employees with relevant, personalized information, thereby improving the customer experience and positively impacting client retention.

Today, customer information, Benefits Information and other relevant information exists in a number of disparate systems. Responding to an inquiry or taking action on a worksite employee or customer is cumbersome, with client service resources having to access information from a variety of locations. Providing access to customer information in one central location is significantly improving the ease of customer service operations, allowing the contact center, service center and other business units to be considerably more efficient and effective. Now we can provide a 360 degree view of information for strategic business decisions. With current CRM/OBIEE System we can provide Enterprise wide reporting solution Service, Finance, Recruiting areas. Also, Insperty CRM/BI solution can provide self-service, ad-hoc reporting solution for power users/end users.

CRM/BI implementation is providing a centralized method for tracking interaction with customers and worksite employees. The application allows Insperty service teams to track activities and service requests for customers and worksite employees, providing Insperty management a better understanding of customer support activity and the ability to represent service levels to clients.

It is also providing support personnel with access to timely, relevant information to provide higher quality customer service. By allowing access to a significant amount of customer information via one system, Insperty see enhanced productivity among sales and service personnel.

## Insperty OneVoice - CRM/BI Footprints

Insperty is currently running Siebel On Premise CRM version IP2014 (PS16) For approximately 1,400 users with core Siebel modules include CRM Base, Call Center, Email Response, and Field Service. Insperty is currently running OBIA 7.9.6.4 and OBIEE 12c (BIFS, Hyperion – Essbase) for reporting solutions. We are also implementing Business Intelligence Cloud Service (BICS, VA, DV DeskTop). We are using Oracle 11g, SQL Server 2008 as our databases.

Current OBIEE solutions are providing complete spectrum for reporting, analysis, modeling and forecasting for major areas like,

- Service
- Finance
- Recruiting

OBIEE Dashboards are integrated within CRM application using Symbolic mechanism.

We have implemented Oracle Service Cloud /Right Now (November'2016 Release) as multi-channel tool that allows Insperty customers to connect to Insperty teams using Chat and Co-browse. In near future, we are going to expand it using emails too.

## Case Study OneVoice (CRM Architecture)

OneVoice, Customer Relationship Management System is System of records for Contact Center/Service Center, which has multiple real time/batch integrations to pull data from various other systems shown below,

AIMS – Legacy Customer Centric Application

OBEE/Benefit Studio – Legacy Application to store Benefit data like 401K, HAS/FSA etc.

OEE Priming Application – Legacy Prospect Application

OneVoice – Customer Relationship Management (Siebel CRM), Centralized System of record for Service data

OneForce - Customer Relationship Management (Siebel CRM on Demand), System of record for Sales

Net Suite CRM – CRM with Finance data (ABU Information)

CRM Desk Top – Application to exchange scheduling /orientation CRM data with Outlook

Service Cloud /Right Now (Chat Co-browse) – Chat/Co-browse solution

BI/Reporting Solution pulls data from CRM system and provides a 360 degree view of information for strategic business decisions.

## Insperty Advantages

Overall with CRM/BI/Service Cloud services, we can,

- Utilize Multi-Channels to connect with Customers
  - Chat
  - Co-browse as screen sharing
  - Email \*
  - Knowledge
- Improve customer experience and retention
- Provide better quality service
- Efficient Service
- Make service delivery more visible
- Increase sales and service productivity

## Right Now (Service Cloud) – OneVoice (Siebel) Integration

Initially, when we started Service Cloud Project, prime requirement was to integrate Siebel application with Service Cloud console. To achieve that, Oracle Service Cloud add-in has been developed to retrieve customer and service request information from Siebel and to send Service Request information from Oracle Service Cloud to Siebel.

This add-in allows contact center agents to see latest information regarding their customer/service request while they are working on Tickets or Chats. It provides two way communications within Right Now and Siebel to facilitate prompt improved customer service.

With Siebel & Service Cloud integration complete Incident/ Chat transcripts has been shared as attachment with Siebel.

Multiple Components have been developed and used to achieve integration between Service Cloud and Siebel application; these components are,

- Oracle Service Cloud Add-in
- Oracle Service Cloud SOAP API
- .NetBrowser Control

## **Right Now – OneVoice (Siebel) Integration, Components**

### **Oracle Service Cloud Add-in**

Oracle Service Cloud agent desktop functionality can be extended using desktop add-in framework, which allows developers to add custom controls, components and applications within live agent desktop. These components can be added to the different visual areas of the agent desktop such as application menu, status bar, workspace, and navigation panel.

For Oracle Service Cloud Add-in workspace add-in has been used, which are built using .Net platform.

### **Oracle Service Cloud SOAP API**

SOAP API is being used to update ticket information as well as to be able to error log information.

### **.NetBrowser Control**

For Insperity custom solution to display multiple Siebel session within Right Now console, .NetBrowser control has been used. This custom control is used to resolve issues with multi sessions and treat the session as isolated sessions.

This custom component was added to Oracle Service Cloud Add-in, which communicates to Siebel.

### **Siebel Integration using Web Services**

Oracle Service Cloud add-in communicates to Siebel using web services /WSDLs. Siebel Web Service used for following scenarios,

- Contact Search
- Service Request Search
- Create Service Request
- Update Service Request

## **Right Now – OV (Siebel) Workflow**

There are certain actions like web service call, rule invoke performed during Right Now Siebel integration; these actions are specific to various scenarios,

- On Workspace Load
- On Create/Update Service Request
- Create /Update Service Request Error generation

## **DotNetBrowser – Use case & Issues**

As per the initial requirements, we have to invoke separate Siebel sessions, corresponding to each chat within the Right Now console. Siebel has limitations, which cause sessions to merge; Out of the box DotNet control does not allow “No Merge” option of IE sessions. To support multi session and resolve the merging of session’s issue, custom control has been used.

Custom Control was instable and it has performance issue; Most of the time plug-in crashes which disrupt the application flow.

There have been usability criteria, technical issues which had impacted our decision of displaying Siebel application within Service Cloud console using DotNetBrowser Plug-in.

To resolve these issues, an alternative approach has been designed. The proposed solution is based on removing DotNetBrowser and using historical reference of Chats /Incidents and overwrites IE sessions for multiple chats.

There have been usability criteria, technical issues which had impacted our decision of displaying Siebel application within Service Cloud console. We had to choose, if we need new to display Siebel application within Right Now Console or display in separate browser.

Our current approach is redesigning Chat/Incident UI use links to open Siebel session in external browser window. We are also going to expand e-Mail functionality and data sharing with Siebel application.

### **Next for CRM/Service Cloud @ Insperity**

- CRM (Siebel) upgrade Innovation Pack IP2017
- Expand chat and co-browse functionality to service providers (Business Users/Recruiting)
- Redesign Chat/Incident Workspaces
- Enhanced data sharing with OneVoice
- OneVoice(Siebel) application redesign, Open UI /UX changes (Usability)
- Expanding e-Mail through Right Now
- Usability improvements
- Links to invoke Siebel externally
- Upgrade

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