

Insperty's Open UI Upgrade Project, Increased Agility by Rapid Adoption of Siebel Innovation Pack

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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 data exist 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 the current CRM/OBIEE system we can provide an enterprise-wide reporting solution for Service, Finance, and Recruiting areas. Also, Insperty's CRM/BI solution can provide a self-service, ad-hoc reporting solution for power users/end users.

Our 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 sees enhanced productivity among sales and service personnel.

Environment

Insperty is currently running Siebel On Premise CRM version IP2014 (PS12) 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 11.1.1.9 (BIFS, Hyperion – Essbase for reporting solutions. 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.

Case Study OneVoice (CRM/BI Architecture)

OneVoice, Insperty's Customer Relationship Management System (Siebel), is the system of record for our Contact Center/Service Center and 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)

Enwisen – Application to display Benefit Information

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

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

Our 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 services, we can:

- Improve customer experience and retention
- Provide better quality service
- Efficient Service
- Make service delivery more visible
- Increase sales and service productivity

OneVoice Open UI/ IP 2014 Upgrade

Initially, when we were deciding to upgrade our Siebel environment and go to Open UI; we had to choose from one of the following upgrade path:

- upgrading Siebel 8.1.1.7 to 8.1.1.11 /Open UI
- upgrading Siebel 8.1.1.7 to IP 2013/ IP2014 and Open UI

There have been some other decision criteria's which had impacted our upgrade path decision. We had to choose, if we need new environment or we can go with in-place upgrade; One another decision factor was to consider OUI vs HI expectations.

In November 2014, Siebel Innovation Pack 2014 has been release with following major features:

- Responsive Web DesignNew Open UI theme - Aurora
- New redesigned screens and views
- New Open UI usability features
- Dispatch Board availability

After couple of rounds of discussions with our consulting partner, Ponder ProServe, Insperty team decided to go IP2014 upgrade route. While Insperty team has been working on DEV upgrade, PS3/4 & PS5 have been released. These latest patch sets resolved couple of critical issues related with Dispatch Board fix, Drag-Drop etc.; So Insperty choose to early adopt IP2014 (PS5). Insperty has completed upgrade from Siebel 8.1.1.7 to IP2014 (PS5) in June'15.

Open UI / IP 2014 Upgrade & Patch Set Process

There are some highlights related with Insperity's Open UI Upgrade project:

- We used IRM – In place upgrade, which faster than full upgrade
- Completed IRM's in Pre-Prod (DEV & TEST) environment
- Started with IP2013, moved to IP2014 for dev
- Production upgrade directly to IP2014 PS5
- Usage of Parallel development during the upgrade process
- Customizations preserved, lesser conflicts, faster go live
- Critical conflicts very limited, mostly with BIP
- No big bang upgrade, incremental upgrade was quick
- Dev upgrade using IRM completed in less than 2 days (end to end)

Quick Wins with Open UI

Upgrading to Siebel Open UI has provided Insperity with several quick wins. Many of our business process flows involves data-driven field visibility and applet image/visual indicator business rules. (For example, our client onboarding process utilizes several dozen form applets each with multiple fields that are required or hidden based on other pertinent data.) Most of these requirements were implemented using complex applet toggles and other configuration settings that were tedious to maintain. With Open UI, we've been able to replace much of this configuration with simple PM/PR mechanisms; this has allowed us to keep a cleaner repository and has reduced our application maintenance/support load.

The upgrade to IP2014 has also improved Insperity's user experience. In addition to the more modern web features that come standard with Open UI, the ability to add custom themes has allowed us to align the look-and-feel of our CRM system with that of our other corporate-branded applications.

Other advantages include:

- New Modern Look and Feel (Insperity themes), Insperity Theme has been used to make CRM Application look n feel consistent with other Insperity applications
- Personalized Application
- User adoption has been improved
- Multiple Device Support, With Open UI implementation multiple devices laptops, Surface, iPads can be used to access application
- Browser Independence
- Productivity Improvement
- Faster, Lower Cost Development; as it's an in place upgrade, it's faster & low development effort implementation in comparison with earlier implementations
- List/Form Applet performance improvements
- Parallel development

Challenges

Some of the challenges we faced revolved around the removal of ActiveX controls in the new Open UI framework. Some of our CRM needs were met by leveraging the COM object model to allow user to import customer data from Excel spreadsheets. This solution had to be redesigned using server-side scripting to import data from files in a central location. Another AX control solution we utilized in Siebel CRM was the Field Service Dispatch Board. This was one of the last AX controls addressed by Oracle with a replacement Open UI solution becoming available in IP2014. Again, we needed to

redesign some of our processes around the FSDB and account for some lost functionality in the new solution (such as the ability to drag items off the board).

Best Practices & Lesson Learned

During our Open UI Upgrade Projects, Insperity has been following major project tasks, which were very helpful for successful completion of the Project:

- Perform proper assessment prior to upgrade
- Perform proper research prior to choose Patch Sets, Check all the known Issues/Bugs and their resolutions
- Follow guidelines provided through Upgrade Advisors
- Proper project tasks for each of the environments, Insperity has four environments DEV/TEST/STAGE & PROD
- Testing, in all environments, multiple rounds of testing
- Issue Tracking System, Maintain proper issue log and categorize issues, that would be helpful to track the issues/resolutions and go live decisions
- Proper project communication
- Go Live Check list preparation

Future Roadmap

- Dispatch Board improvements/Issue fixes/Alternatives
- IP 2016 Upgrade
- OneVoice(CRM) application redesign
- Microsoft SQL Server 2012/Office 2013 upgrades
- On-Premise, Cloud, Hybrid Reporting
- Mobile, Smart device capability