Case Study for

Customer Relationship
&
Support System

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Case study for Customer Relationship & Support System

Customer	Confidential
Challenge	Build product model, pricing based on the Customer offerings and generate quotes and orders using Siebel
Technology	Siebel
Vayu Edge	Working closely with end users, agile development
Success	Quote and Order generation was accurate and flexibility in product offering.

The Customer:
The customer is a one of the major health insurance company providing health insurance coverage in USA.

The Challenge:
The customer sought Vayu's services to develop a customer facing CRM application using Siebel Order Management and Pricing which will automate quote, order process.

The Solution:
Out of the box Siebel proposal generator was not good enough to meet client's need for building products, pricing, generating quote, fulfilling order and representation of data to the end users. Siebel OM, Pricing, Web Services and eScript was used to model the solution. Templates were provided by the client team which was used as a baseline to generate quote and order in the runtime. Quotes were generated as pdf document was read only and was attached to the quote for easy access. Siebel product model was used for defining Client products and pricing. Siebel Web services were developed to integrate Orders to other external systems.

Success:
Quote, Order process was fast and the data was correct and accurate. Customer's marketing team has more control and flexibility on the product offering and easy to create/change the products based on the market conditions. This system was made as one of the Enterprise level application and used across the Organization. Vayu Inc CRM team was appreciated by high level customer executives for delivering such a great product though few of complex requirements were included in the last phases of the project.