



Overview

Country or Region: UK

Industry: Finance

Customer Profile

Barclays provides multi-channel services, such as online banking, telephone banking, and branch banking to its personal customers, and commercial wholesale banking services across the UK, Europe, and Africa.

Business Situation

Barclays required an efficient, reliable and scalable solution for delivery of Sales and Service data both to the Sales Force and to key decision-makers and strategists.

Solution

Ridgian implemented an Intranet-based data integration and reporting solution built on the Microsoft Windows DNA model. A clustered server set up provided a scalable architecture allowing thousands of users to connect every day.

Benefits

- Reward and motivation for Sales staff, leading to increased sales and service achievement.
- Easy access to data for strategic decision-making.
- Efficiencies through centralisation of disparate MI solutions.



Timely and Accurate Business Intelligence Boosts Performance of Bank Sales Force

“We now collate and report our Sales performance statistics rapidly and accurately. The benefits of the ASSIST Reporting application can be directly quantified in Sales uplift. ”

Kevin Rodgers, Head of Information, Barclays

Ridgian have worked closely with Barclays to develop a Business Intelligence solution that is flexible, scalable and robust, and that can cope with adaptive strategies in Sales and Service reporting.

Built on Microsoft Windows DNA architecture, the application is deployed on a server farm to cater for thousands of concurrent users accessing from all over the UK in locations such as retail branches, customer call centres and head offices.

Reports are provided on a self-service basis via an Intranet portal. Users receive a tailored dashboard view based on their preferences and areas of responsibility. Efficient storage, caching and querying processes allow users to drill down through the hierarchy from National level right down to individual sales staff, with instant response times. Report history is maintained and is fully accessible, in some instances going back several years.



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Kevin Rodgers, Head of Information, Barclays

Situation

Barclays is one of the world’s foremost banking organisations. Maximising the effectiveness of sales staff whilst ensuring high standards of service is hugely important. This represents a challenge to an organisation of this size, and Barclays were determined to enhance their reporting systems to maintain high standards. Part of this approach involved centralising their intelligence and reporting systems into a single solution. The principal objective was to provide rapid access to Sales and Service statistics across the organisation via a single portal. Sales staff should be assessed across the organisation on a level playing field. The new system was given the name ASSIST .

Solution

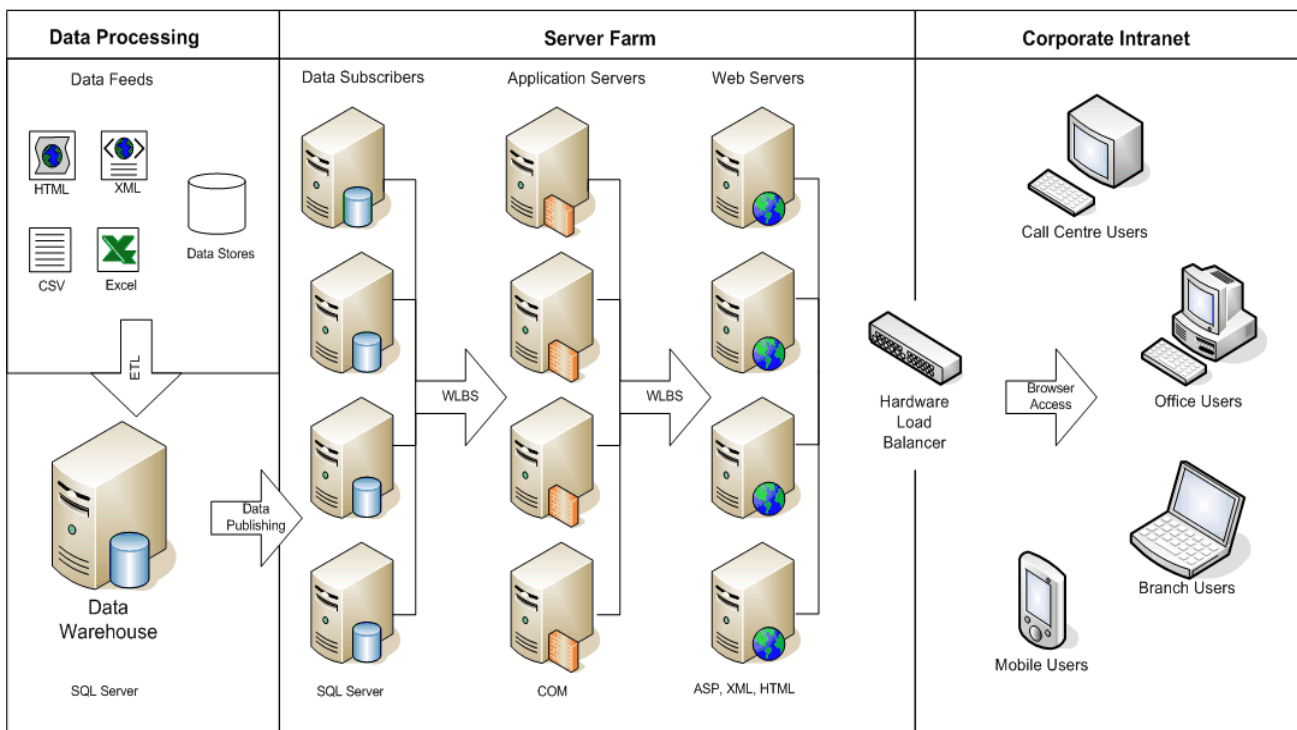
Barclays assessed a number of options for the reporting requirement. Initially, the favourite was a system built on the Cognos reporting suite. However, lack of flexibility and

high licensing costs lead Barclays to approach Ridgjan to provide a proposal based on the Microsoft platform. Ridgjan were given 2 weeks to produce a prototype before both proposals were rated against a set of success criteria. Ridgjan were chosen by Barclays following their assistance with various tactical solutions employed prior to the initiation of the ASSIST project.

Barclays were convinced that a bespoke solution was the only option that could fulfil their demands for delivery of Business Intelligence. “Going head-to-head, Cognos delivered less than 65% of what we were after. The bespoke alternative built on the Microsoft platform could deliver on every objective,” explains Kevin Rodgers.

Ridgjan developed an integrated web-based solution to collate data from across the organisation. It allows central business users to design, test, publish and manage reports

ASSIST Architecture



The portal presents a rich user interface, with information represented using graphs and features such as Red-Amber-Green assessments against targets.

and deliver them to the entire organization via a standard portal.

Data Integration

The application is built on a data warehouse assembled from over 100 feeds taken from across the organisation. Data is received in various formats, such as XML, HTML, Excel, CSV and links to other databases. All historic data is retained, building up an invaluable record of previous performance. The warehouse is structured for growth and efficient absorption of additional business areas.

Report Design

A custom design tool was developed allowing business users to create and preview reports using a drag-and-drop interface. A standard palette of reporting controls is provided allowing users to add and configure tables, graphs and other fields. These can then be mapped to data fields exposed by the data

warehouse.

Report Manager

The Report Manager component provides a workflow environment for the report design process. Reports pass through design, data map, test, and live stages. The application links with the project management process allowing report creation and modification to be associated with work packages and change requests.

Portal

Users receive access to reports relevant to them, and with security in place to protect sensitive data. The portal presents a rich user interface, with data represented using graphs and features such as Red-Amber-Green assessments against targets.

Targets

The system also includes administration tools such as a Targets application allowing quantified sales and service goals to be assigned to heads of areas, who are then empowered to cascade to branches and staff as they see fit. Users can then track performance against target, compare with peers, and view projected bonuses based on current performance.

Offline Browsing

Although the main solution is a thin-client, server-based application, a light-weight client-side tool is also available. Barclays have staff on the move who are not able to stay connected to the intranet. The tool is designed to run on a laptop, and synchronize with the central server whenever the laptop is docked. Users can then continue browse their reports even when disconnected from the network.

The screenshot shows a web browser window displaying the ASSIST Reporting interface. The page title is "ASSIST Reporting - Contact Centres - Microsoft Internet Explorer". The browser address bar shows "http://localhost:2000/AssistOnline/Home/ASHHomeDefault.asp". The page header includes the Barclays logo, the user name "Simon Bettenidge", the date "06 Apr 2002 - 12 Apr 2002", and the page title "ASSIST Reporting View Report".

The main content area displays a report titled "Advisor - Lysa Hudson. Summary - Sales Rank of Rank". The report includes a table with the following data:

Contact Centre	Last Week		Last Period		Performance to Date		
	Points	Rank	Points	Rank	Points	Rank	Previous Rank
Saggi, Sukhwinder	204	76	0	0	204	76	0
Kaur, Kulbir	209	78	0	0	209	78	0
Kelly, Kate	231	101	0	0	231	101	0
Thompson, Lucy	234	104	0	0	234	104	0
Buckley, Donna	264	128	0	0	264	128	0
Hudson, Lysa	271	134	0	0	271	134	0
Gill, Baljinder	307	171	0	0	307	171	0
Pattni, Deepa	309	175	0	0	309	175	0
Bottomley, Gareth	401	255	0	0	401	255	0

Below the table, there is a "REPORT INFORMATION" section with dropdown menus for "Advisor" (set to "Hudson, Lysa") and "Summary" (set to "Sales Rank of Rank (Weekly) - Advisor"). A "PRINT" button is also visible. The bottom of the page shows the "ASSIST" logo and "Local Intranet" status.

“Savings became increasingly apparent as the solution grew to incorporate more and more business areas. ASSIST has taken on thousands of additional users each year, without significant incremental cost.”

Kevin Rodgers, Head of Information, Barclays

Benefits

A unified system for sales and service reporting creates clear and tangible benefits for Barclays.

Motivation and Rewards for Staff

Barclays was able to offer sales staff easy access to accurate and timely information on sales performance. Staff can monitor performance day-to-day and adjust strategies as necessary. This allowed sales staff to buy in to and achieve higher performance targets, with a significant increase in sales across the product range. This benefit alone outweighed the cost of implementing the system many times over. The system also drives performance in its use of scorecards and “Top 20” league tables both at Business Unit and Staff level.

Improved strategic decision-making

ASSIST provides aggregated data for use at higher levels within the organisation. This information is invaluable for strategy and planning. It enables senior decision-makers to select the right products to promote at the right time, and to predict sales and set targets accordingly.

Efficiencies of centralisation

Many large organisations suffer from the reliance on unmanaged desktop applications. Reporting is often achieved via Access database and Excel spreadsheet systems developed independently by individual business units and departments. ASSIST provided for elimination of these unscalable approaches, freeing up staff to focus on selling rather than reporting, and ensuring that performance is assessed in a consistent way.

The ASSIST portal provides users with a single point of entry for all reporting areas. The flexible architecture allows new reporting areas to be added efficiently, producing compelling economies of scale. ASSIST began

with reporting to the Retail Network. This expanded to include Contact Centres and e-Channels. Reporting for Barclays acquisitions such as The Woolwich was also incorporated with little incremental cost.

Low cost of ownership

A distinct advantage of the Microsoft approach lay in the low, one-off cost for software licensing. Unlike rival solutions based on products such as Cognos and Crystal Reports, there are no on-going licensing costs and no cost to add additional users. This dramatically reduces cost of ownership. “Savings became increasingly apparent as the solution grew and incorporated more and more business areas. Assist has taken on thousands of additional users each year, without significant incremental cost.” says Kevin Rodgers, Head of Information at Barclays.

For More Information

For more information about Ridgian products or services, call Ridgian Sales on 0121 233 7200. To access information via the World Wide Web, go to:

www.ridgian.co.uk

For more information about Microsoft products or services, call the Microsoft UK contact centre on 0870 60 10 100. To access information via the World Wide Web, go to:

www.microsoft.com/uk

For more information about Barclays products and services, visit the Web site at:

www.barclays.co.uk

Architecture Synopsis

ASSIST is built entirely on a Microsoft platform. Data Integration, processing and warehousing is achieved via SQL Server. Portal and other user applications are developed using SQL Server, Visual Basic COM components and Active Server Pages. Reporting data is produced and cached in XML format, with XSLT employed on the client side via Microsoft's MSXML parser.

The reporting system is a stateless server-side application running on a server farm comprising data, application and web tiers. Hardware and software load-balancing is employed to maximize efficiency, allowing thousands of users to access the system every day.

Software and Services

- Microsoft Visual Studio
- Microsoft SQL Server

■ Technologies

- Internet Information Services
- Microsoft COM
- Microsoft ADO
- XML
- XSLT