



Leading Customer Relationship Management Solutions on IBM eServers

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Agenda

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-  **1 Understanding the Customer Relationship Management (CRM) Marketplace**
-  **2 How infrastructure can affect your success**
-  **3 Leading CRM Solutions**
-  **4 eServer Competitive Advantages and Summary**

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Enterprise Applications Trends

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eRM - Enterprise Relationship Management

- **360 degree customer view - across different business processes**
 - Inventory and suppliers - *Supply chain management*
 - Order entry, tracking and fulfillment - *ERP and e-commerce*
 - Sales, service and marketing- *CRM*
- **Closed loop processes**
 - Integrating intelligence for continuous improvement
 - Operationally and strategically
- **Role-based Web portals**
 - Employee, customer, partner
- **Integrating new channels of communication**
 - Web, kiosks, wireless, PDA's

Integration is key

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Customer Relationship Management

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Customer Selection

Customer Acquisition

Who are the profitable customers?
How do we attract them?

Customer Development

How do we deliver what the customer wants, how they want it, when they want it?

Customer Retention

How do we build and sustain customer loyalty?

The competitive advantage will go to those businesses that manage the full life cycle relationship with their customers

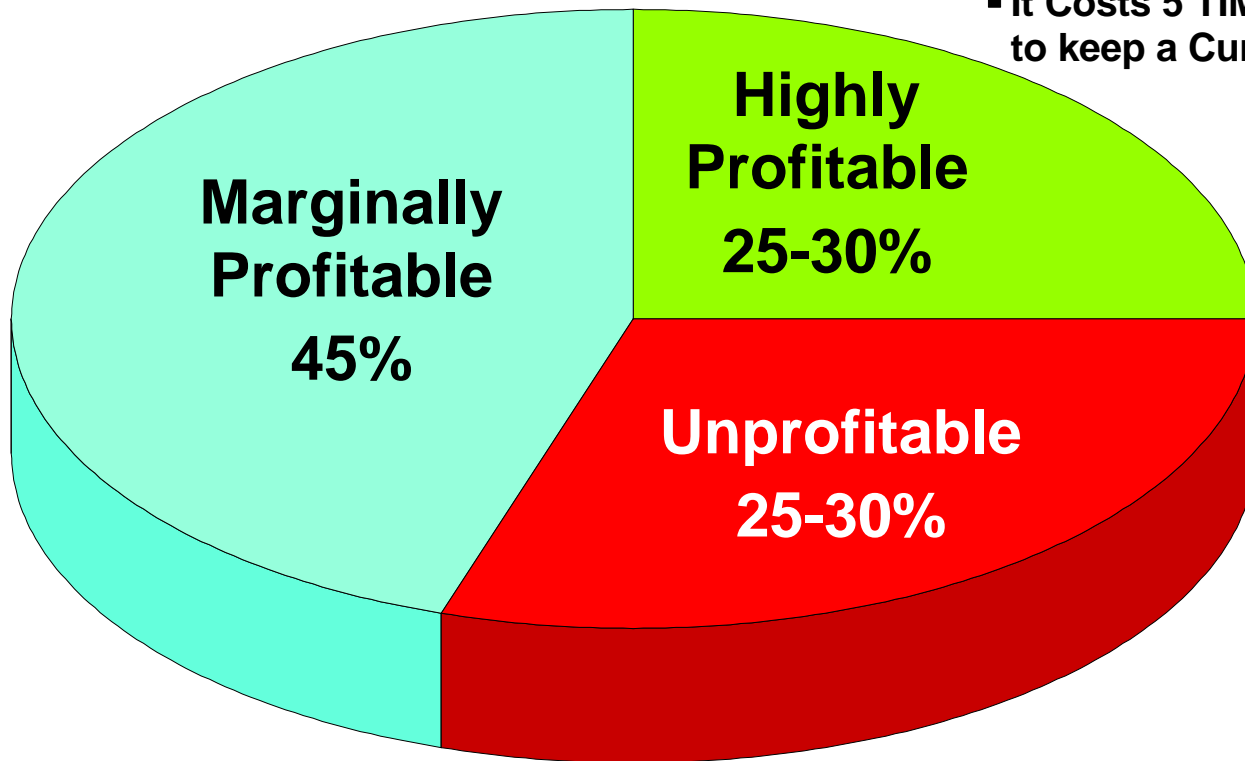
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Customer Profitability Analysis

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Startling FACTS

- For Every Customer Who Complains 26 are SILENT
- Average Unhappy Customer will tell 10-18 Others
- 91% of all Unhappy Customers will not buy from you again
- It Costs 5 TIMES more to get a New Customer than to keep a Current One



Insight

Do you Know which of YOUR Customers are Profitable ?

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Next Generation e-business

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Explosion of Transactions

More users, more devices,
more interaction

4x IT installs in 2 years

Next Generation Internet

Very high bandwidth, low costs

*integration, interoperability,
no downtime ... McKenna*

Deep Computing

Business intelligence,
new science

*50x volume in 5 years
... Forrester Research*



Wireless Access

Anytime, anywhere

*1.4 billion connected via
wireless devices by 2004
... Cahners*

Rich Media

New uses, new markets

*300 million people today
- 600 million by 2003 ... IDC*

Linux

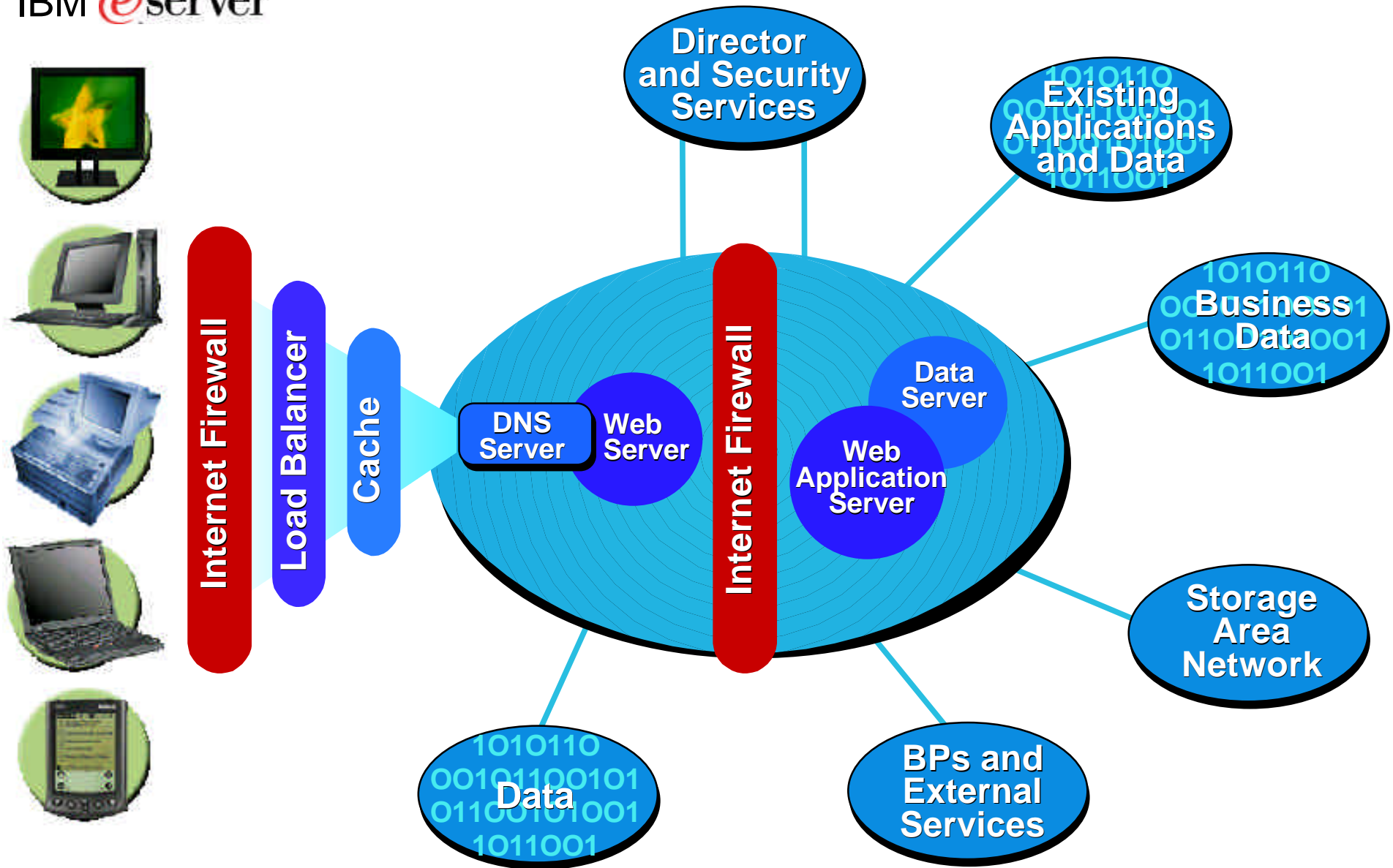
Open source

*Installed on 1 out of every 4
servers today ... IDC, Feb. 2001*

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e-business Infrastructure

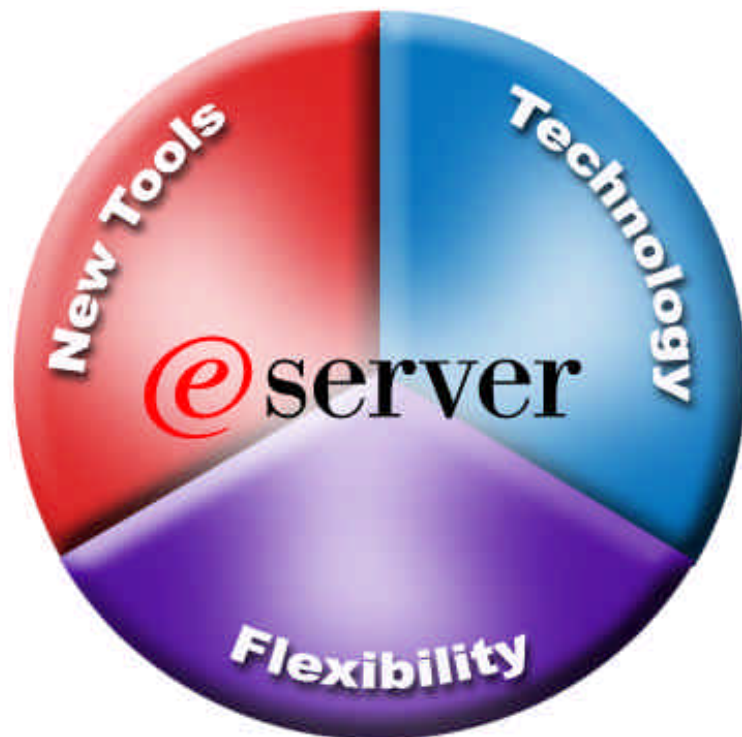
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Critical Server Qualities

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Innovative **TECHNOLOGY** = Leading Server Performance

- Extreme performance and unmatched scalability to grow with your business

NEW TOOLS for Managing e-business

- Self Managing Systems
- New ways to manage growth, risk and cost

Application **FLEXIBILITY**

- Choice in selecting, building and deploying applications to meet your unique business needs and existing environment

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Innovative Technology = eServer Family



IBM **e**server



zSeries

z = Near-zero downtime

- ▶ Most reliable, mission-critical data transaction servers
- ▶ Large centralized environment - dynamic workload management
- ▶ Designed for the high performance and high availability requirements of e-business



iSeries

i = Integrated

- ▶ Most flexible, high-performance, integrated business server
- ▶ Robust application integration and single, integrated operating system
- ▶ Highest level of security available



pSeries

p = Performance

- ▶ Most powerful, technologically advanced UNIX servers
- ▶ Unlimited scalability
- ▶ Industry leading performances in benchmarks
- ▶ Fastest, most flexible commercial UNIX system on earth



xSeries

x = x-architecture

- ▶ Affordable Intel-based servers with mainframe-inspired reliability technologies
- ▶ Freedom of choice in operating environments
- ▶ Designed to handle specific business needs and workloads

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Project eLiza

SELF-OPTIMIZING

SELF-CONFIGURING

SELF-HEALING

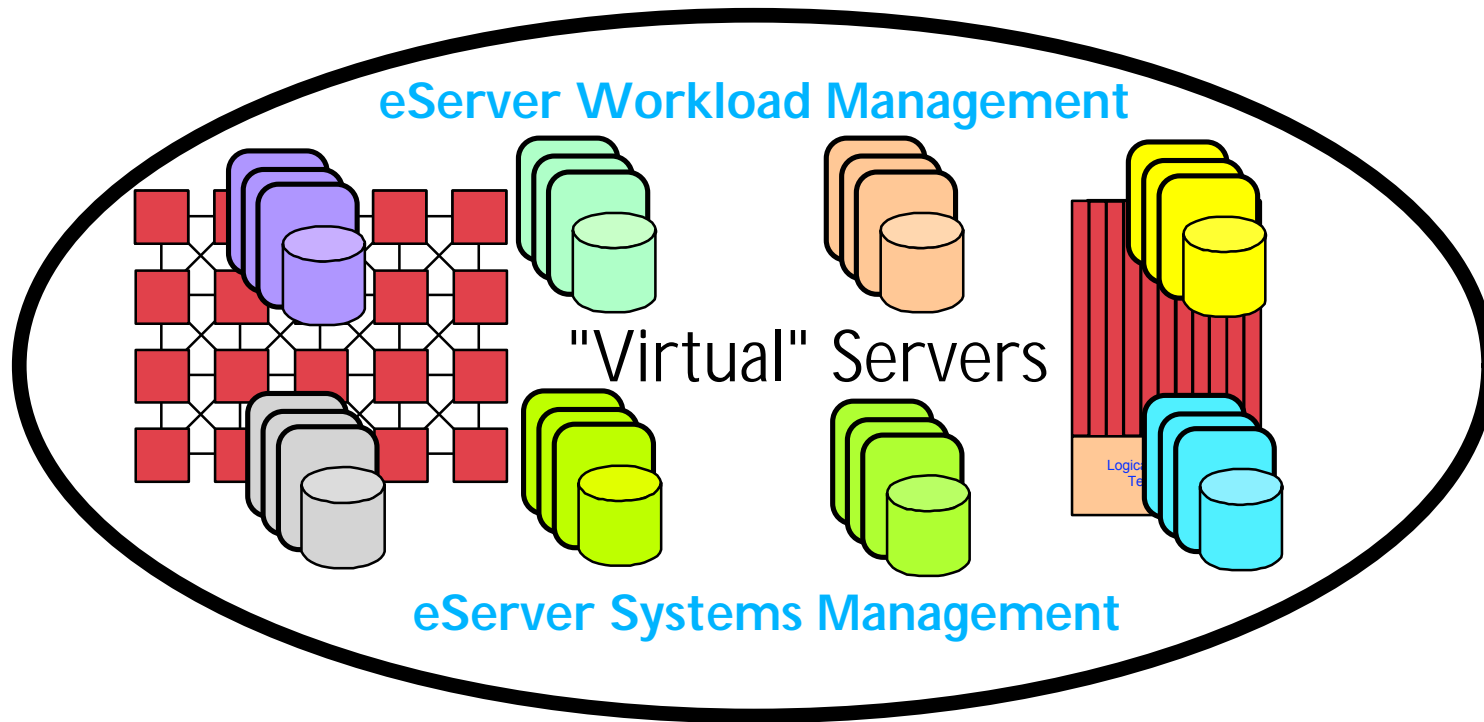
SELF-PROTECTING



IBM @server Future

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The System

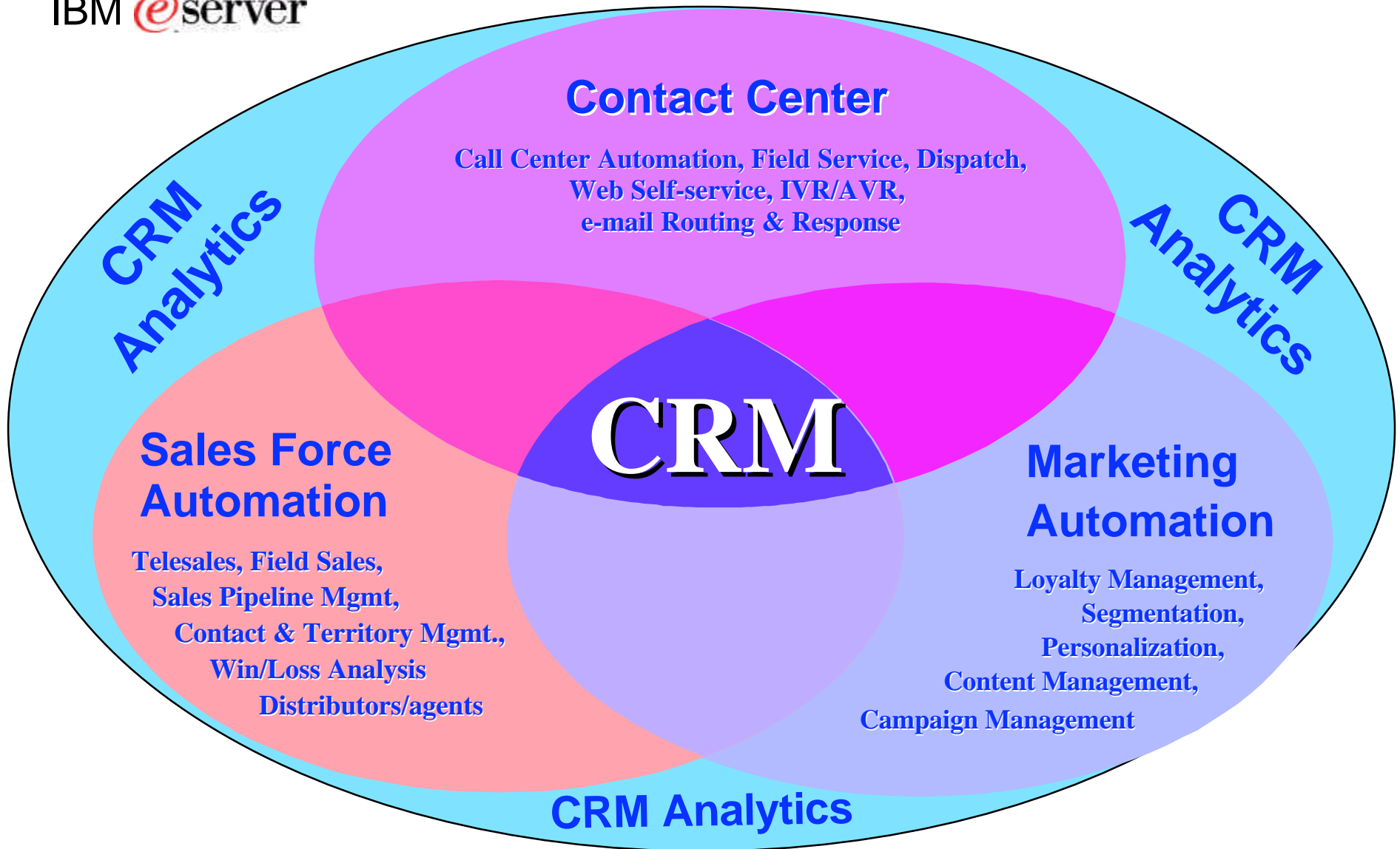


- Consistent Workload Manager
- Partitioning and Clustering Support
- Transparent Integration
- Single systems management

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CRM Application options

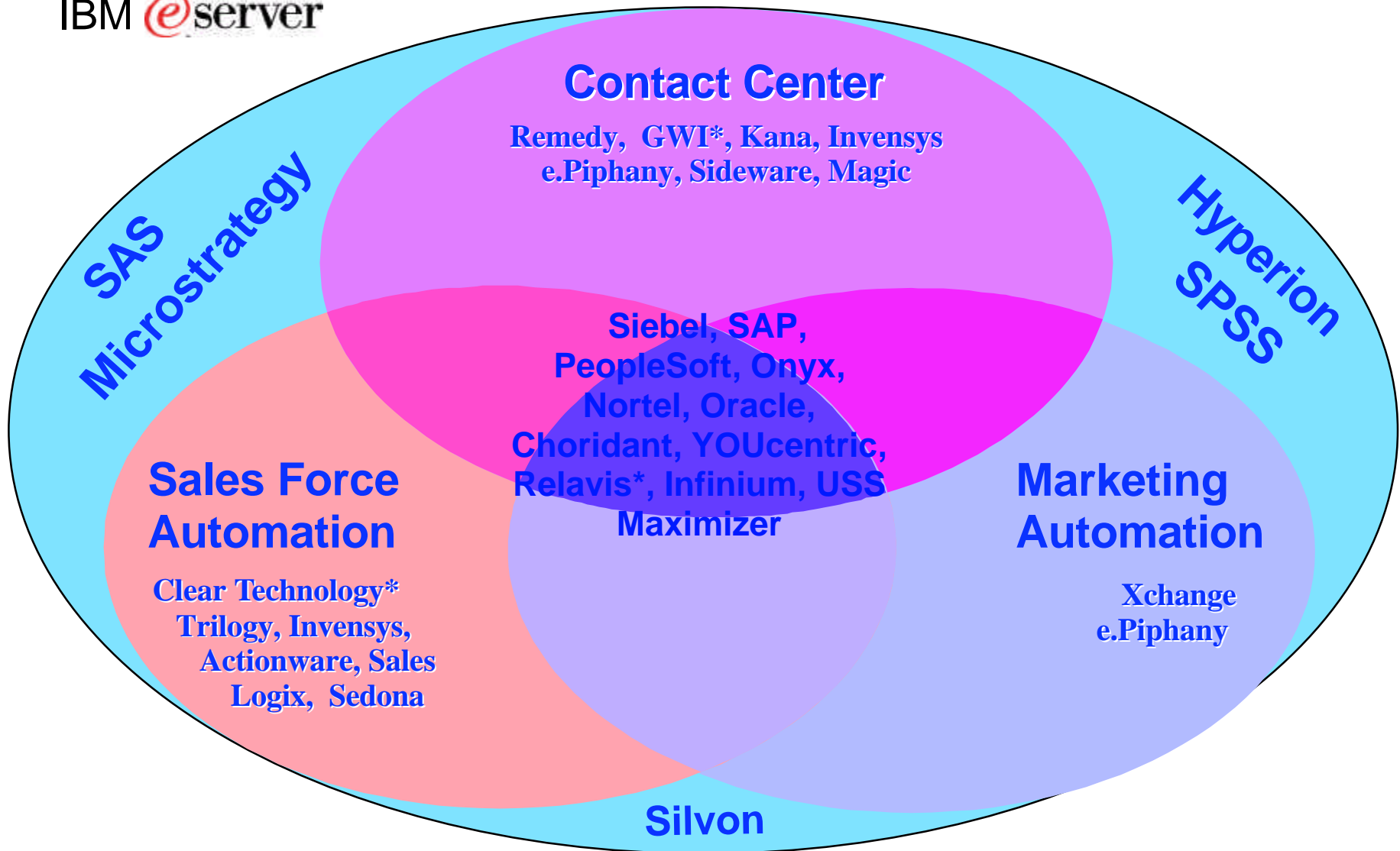
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@server CRM Key Relationships

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* Domino Solutions

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IBM Server Strategy for CRM

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Provide Solutions Using Industry Leading Applications

- Siebel, Kana, SAP, PeopleSoft, Relavis, Invensys...
- Integrate Server Architectures to meet your specific business needs and to leverage your current environment

Deliver Scalable Solutions

- Start Small and Grow
- Departmental Solutions and Enterprise Solutions

Provide Solutions to meet Specific Customer Set Needs

- Large Sophisticated Buyers
- Solution Buyers
- Large, Medium and Small Business

Provide Robust Solutions which:

- Are the Most Reliable in the Industry
- Are Integrated and do not Require Complex Customer Integration

Leverage and Build Partnerships

- Application Solution Providers
- Implementation, Service and Support Providers

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Siebel e-business Solutions

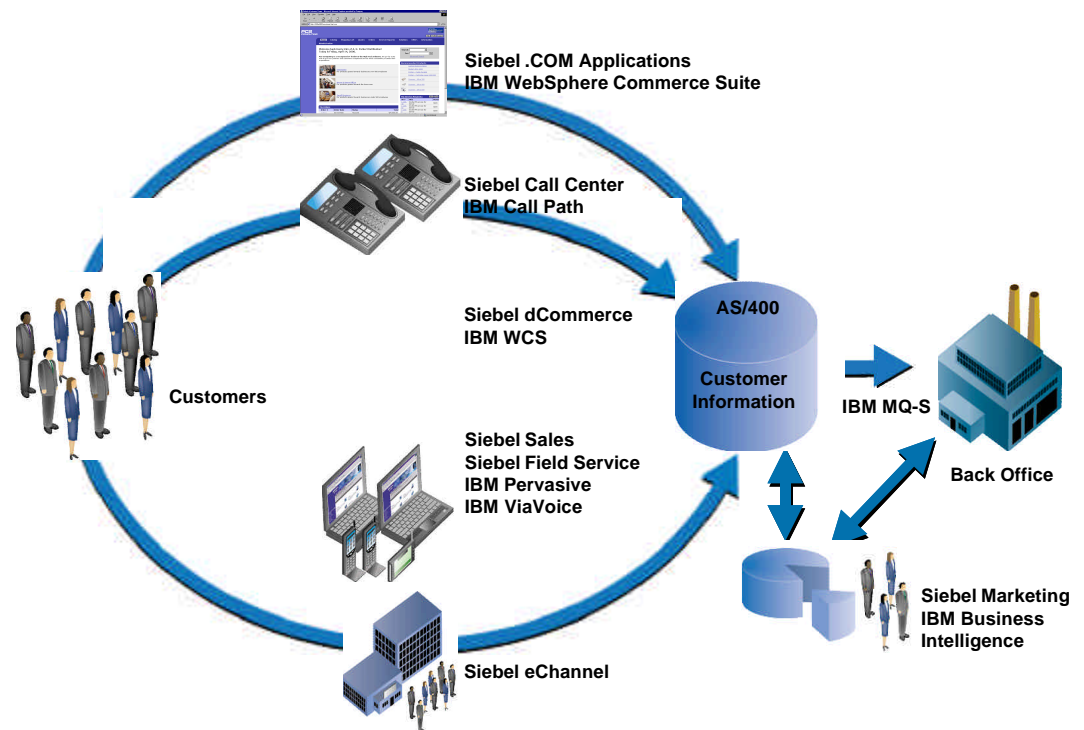
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Siebel e-business 2000

- Call Center, Sales, Marketing
- Field Service
- .com
 - Interactive Selling Suite
 - eAuction, eService, eMarketing
 - eChannel
 - eMailResponse, eBriefings,
 - eContent Services, eTraining

Siebel e-business 2000, Midmarket Edition (MME)

- Customer Applications
 - eCustomer
 - eAuction
 - eCampaigns
- Employee Applications
 - Sales
 - Call Center
- Partner Applications
 - eChannel



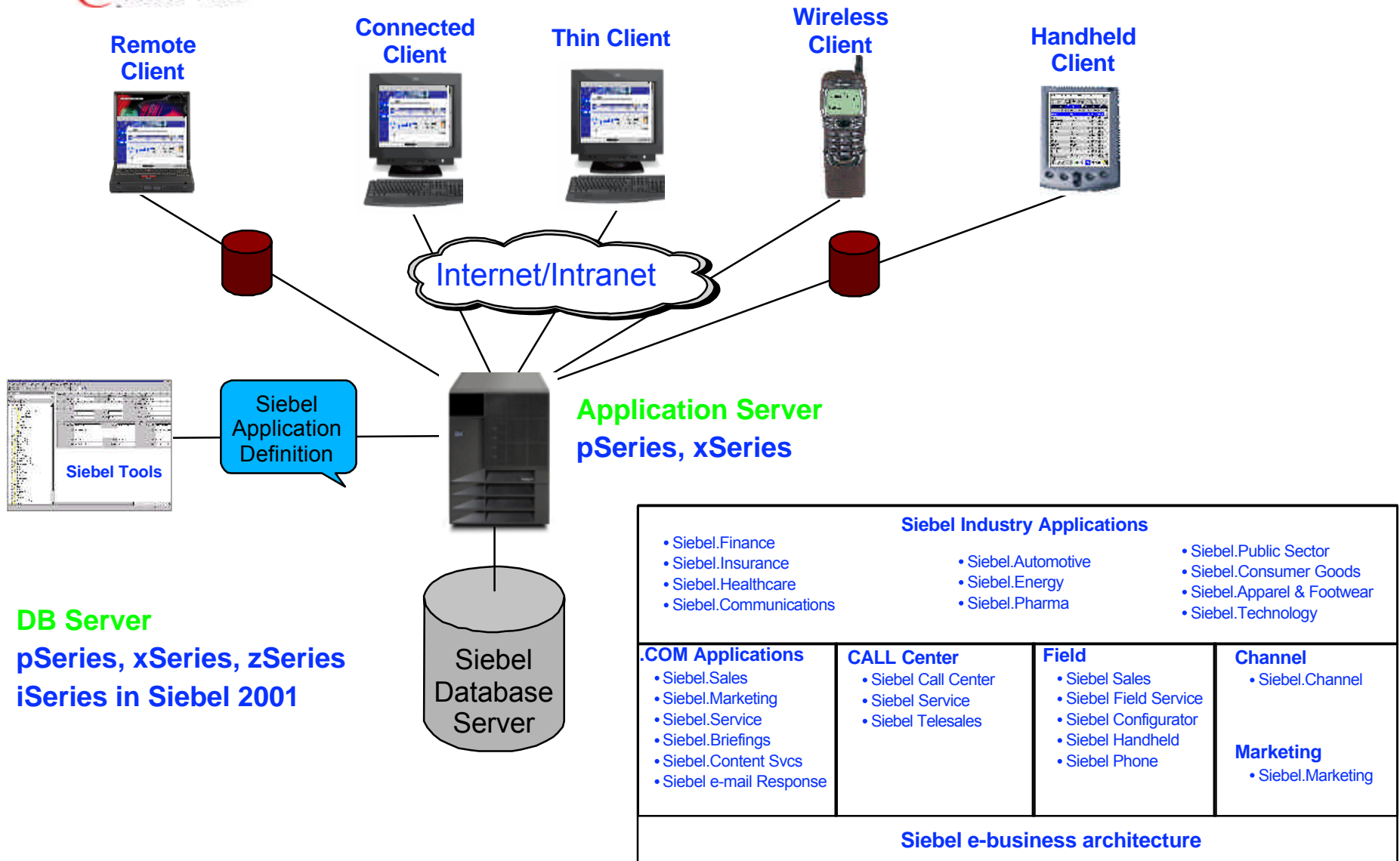
Siebel Industry Applications

Preconfigured versions of Siebel e-business 2000 tailored for a specific industry

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Siebel Application Architecture

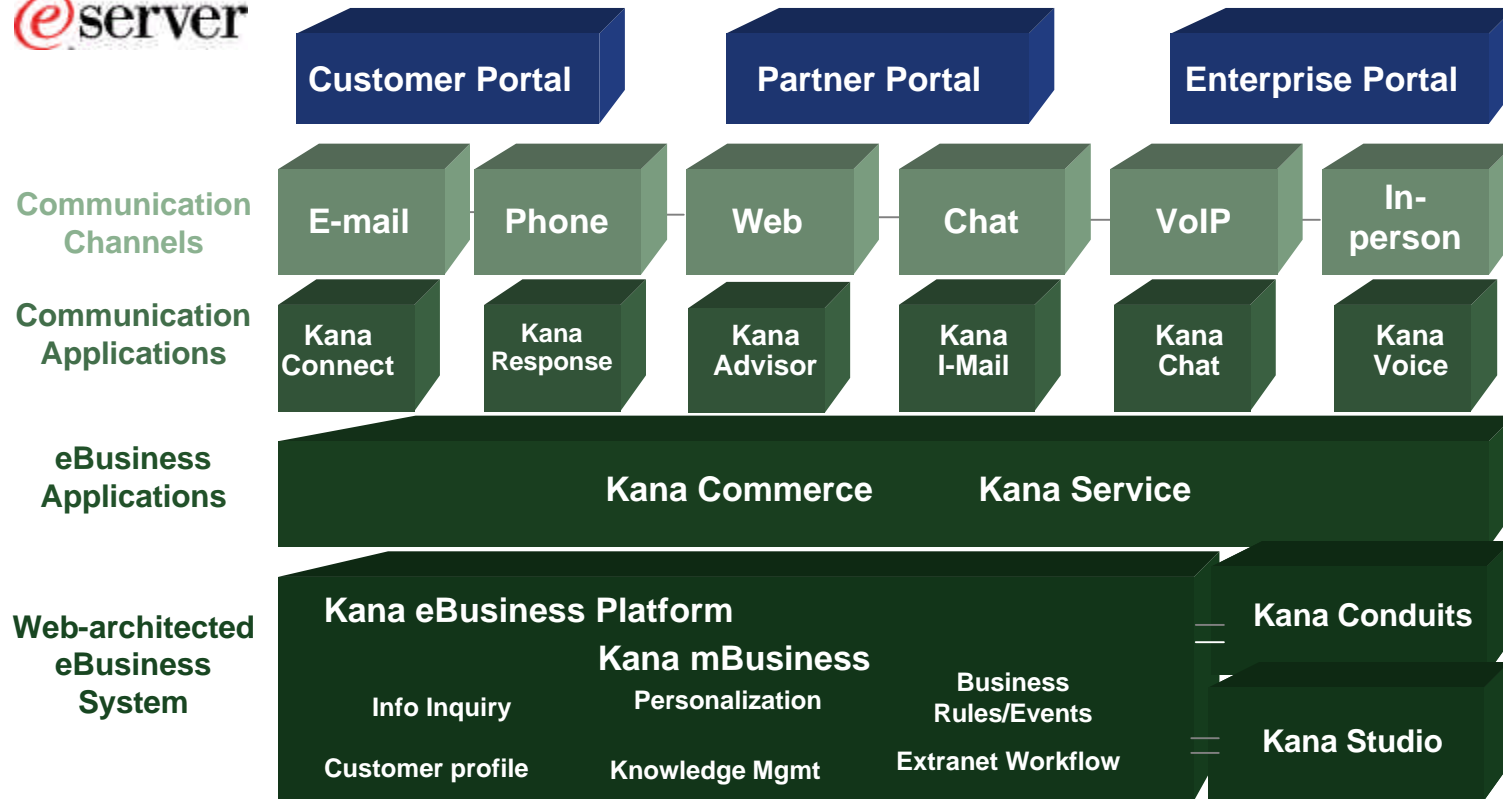
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Kana Communications

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■ Unique Features

- Complete Sales, Marketing, and Service applications for the Web
- Leverage Web capabilities - 100% Web focused Solution

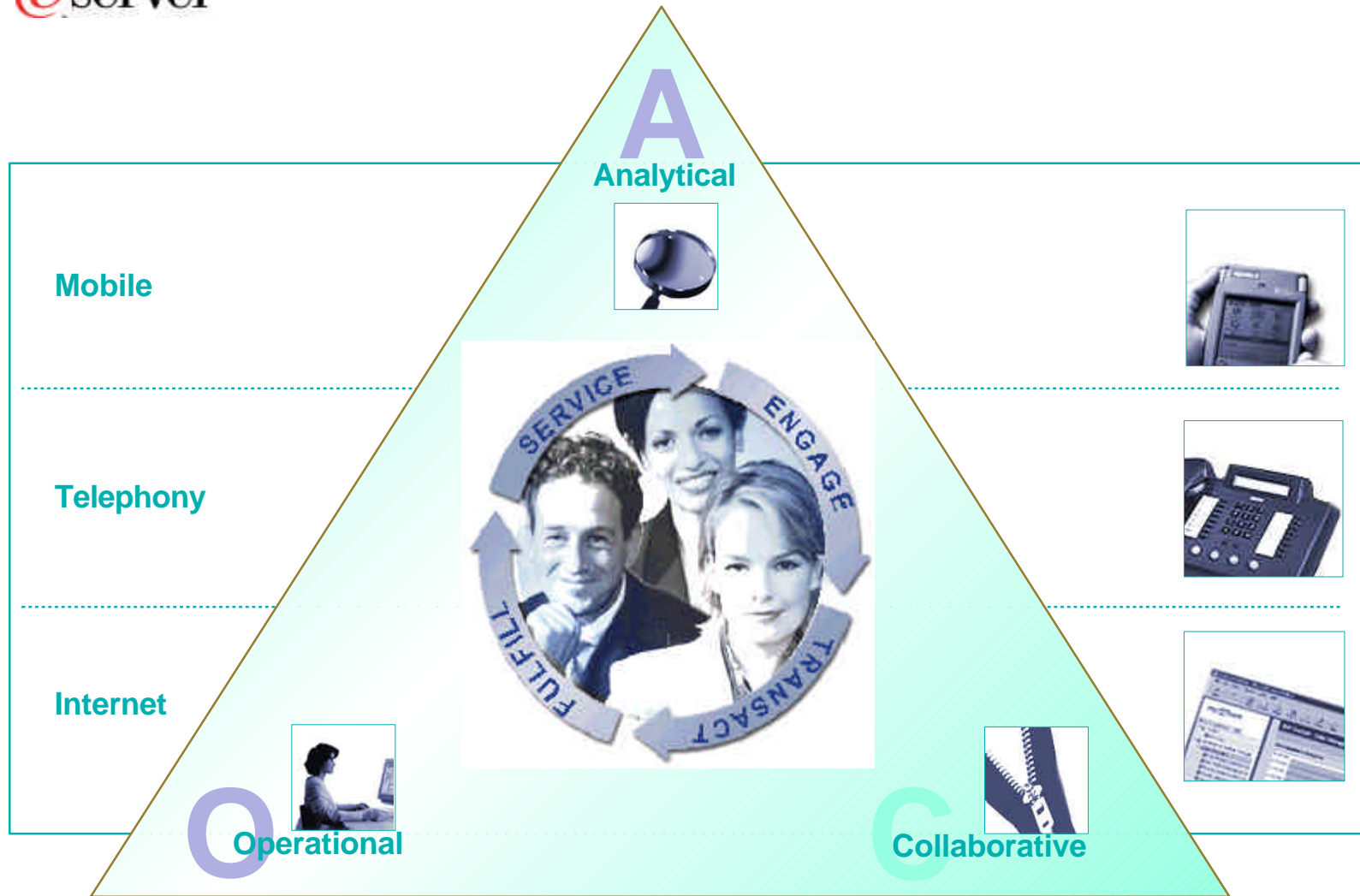
■ Platform Support

- xSeries, pSeries
- For More Information: www.kana.com

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mySAP Customer Relationship Management

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PeopleSoft CRM with Integrated Analytics

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PeopleSoft CRM solutions have a wide breadth of functionality including:

- **Vantive eSales**
 - Lead Management, Forecasting, Opportunity, Management, Territory Management
 - Vantive eHelp Desk
- **Asset Management, Problem Tracking, Escalation Mgmt, Change Management**
 - Vantive eService
- **Call Center, Entitlements, Business Process (work flow), Knowledge Mgmt, Quality**
 - Vantive eField Service
- **Service Orders, Procurement and Inventory Mgmt, Contracts Administration, Dispatch**

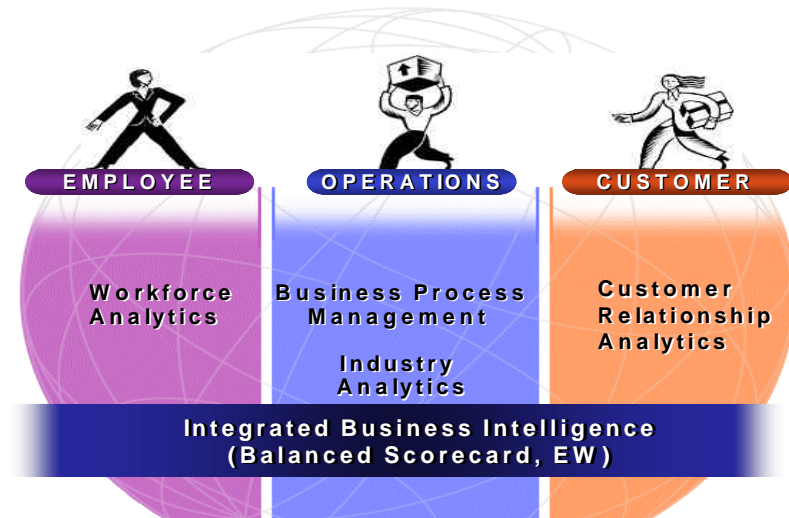
Platform Availability

- **zSeries and pSeries**

Enterprise Performance Management

- **Based on extractions from production data**
- **Analytical analyses of business metrics**
- **Basis for application specific workbenches**
 - Integrated with PeopleSoft CRM
- **Thin Client**
 - Lower-cost maintenance and upgrade
 - Increased number of users/transactions

360° business intelligence



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Invensys/Baan CRM Offerings

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MarketingPlus

- Marketing Automation
- Reports



SalesPlus

- Sales Force Automation

e-Configuration

- Configuration tool
- e-Configuration tool

BackOffice Integration

- Baan
- SAP

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xChange Application Solution

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Marketing Automation and Campaign Management System

- Campaign management
- Customer lifetime Value and segmentation
- e-mail Campaign Analysis and Management
- Realtime Datamart Synchronization
- Banking Specific Application Template

Solution

- Data Mining and Analysis using integrated MicroStrategy component
- 3-Tier solution
- For More Information: www.xchange.com

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Engage Offering (Clear)

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SFA Functionality

- Enterprise Contact and Activity Management
- Complete Forecasting and Opportunity Management
- Powerful Quote and Contract Management
- Pipeline Management

Service and Help Desk Functionality

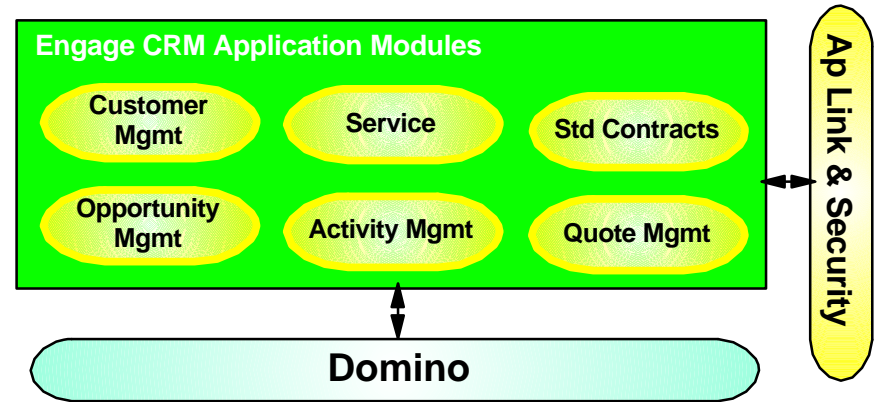
- Time and Project Billing Management
- Customer and Contract integration
- Basic Help Desk Incident Tracking

Enterprise Marketing and Communications Systems

- Marketing Campaign Management
- Powerful Broadcasting and Communication System
- Marketing Encyclopedia, Presentations, Collateral

E-Touch Point Web Messaging

- High Level XML Integration to WebSphere, MQ, Net.Commerce
- Engage e-touch point messaging sends messages, creates activities within Engage
- For More Information: www.cleartechnologies.net



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Relavis Offerings

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Relavis e-business Applications

- eSales
- eMarketing
- eService

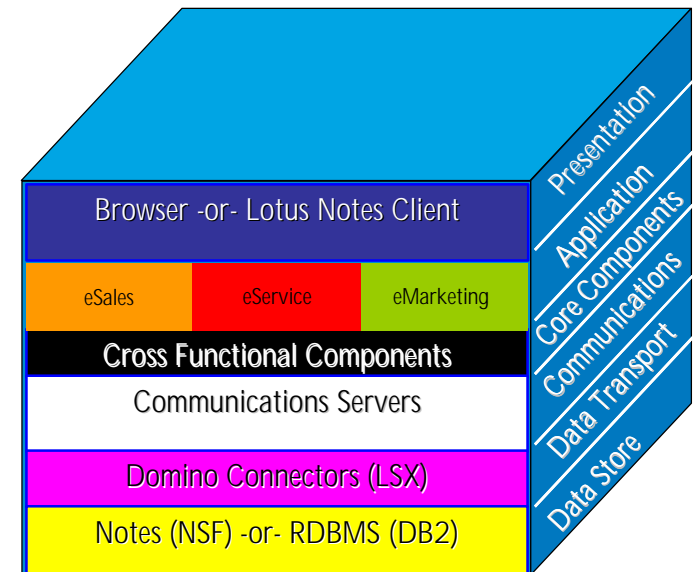
Solution focus

- Mid-market/GMB
- Notes/Domino infrastructure
- Customers that sell/support complex products/services

Fast implementation and easily configured
for various industry verticals

Leverages all collaborative technologies

For More Information: www.relavis.com



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Onyx

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CRM Applications

- 100% Web-based
- Sales Force Automation Support
- Basic Customer Self Service Applications
- Vendor Self Service Applications
- Basic Marketing Applications
- 3 Tiered Solution
- Utilizes Microsoft DNA Architecture

Packages

- Employee Portal - Sales force analysis and Service Integration
- Customer Portal - Web self service, e-mail support
- Vendor Portal - Web self service, e-mail support

Platform Support

- xSeries Only
- Built using Microsoft Products
- For More Information: www.onyx.com

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IBM CRM Server Summary

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Proven

- Many Many References
- All Solutions Supported
- Complete Range of Offerings - small to large
- Optimized for e-business/CRM Applications
- Integration with BI and ERP Applications and Servers
- Designed to be easily integrated into YOUR business environment
- Complete Services Offerings

Solution/Results Oriented

- From Assessment to Implementation
- Industry Specific and Cross Industry

Partner Focused

- Leverage Solutions
- Integration with CORE Business Applications - ERP, SCM, BI...



IBM is the number one server vendor worldwide for the first quarter of 2001, gaining four points of market share in the quarter

International Data Corporation (IDC) June 13, 2001

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Summary

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CRM is a Fast Growing Opportunity

IBM @server is the ONLY Vendor who can deliver complete solutions across all customer environments

- Small to Large
- Centralized to Distributed
- Hardware, Operating Systems, Middleware, Databases, Applications, and Service

It's About Business Value - NOT Technology

Focused on solutions - not just technology

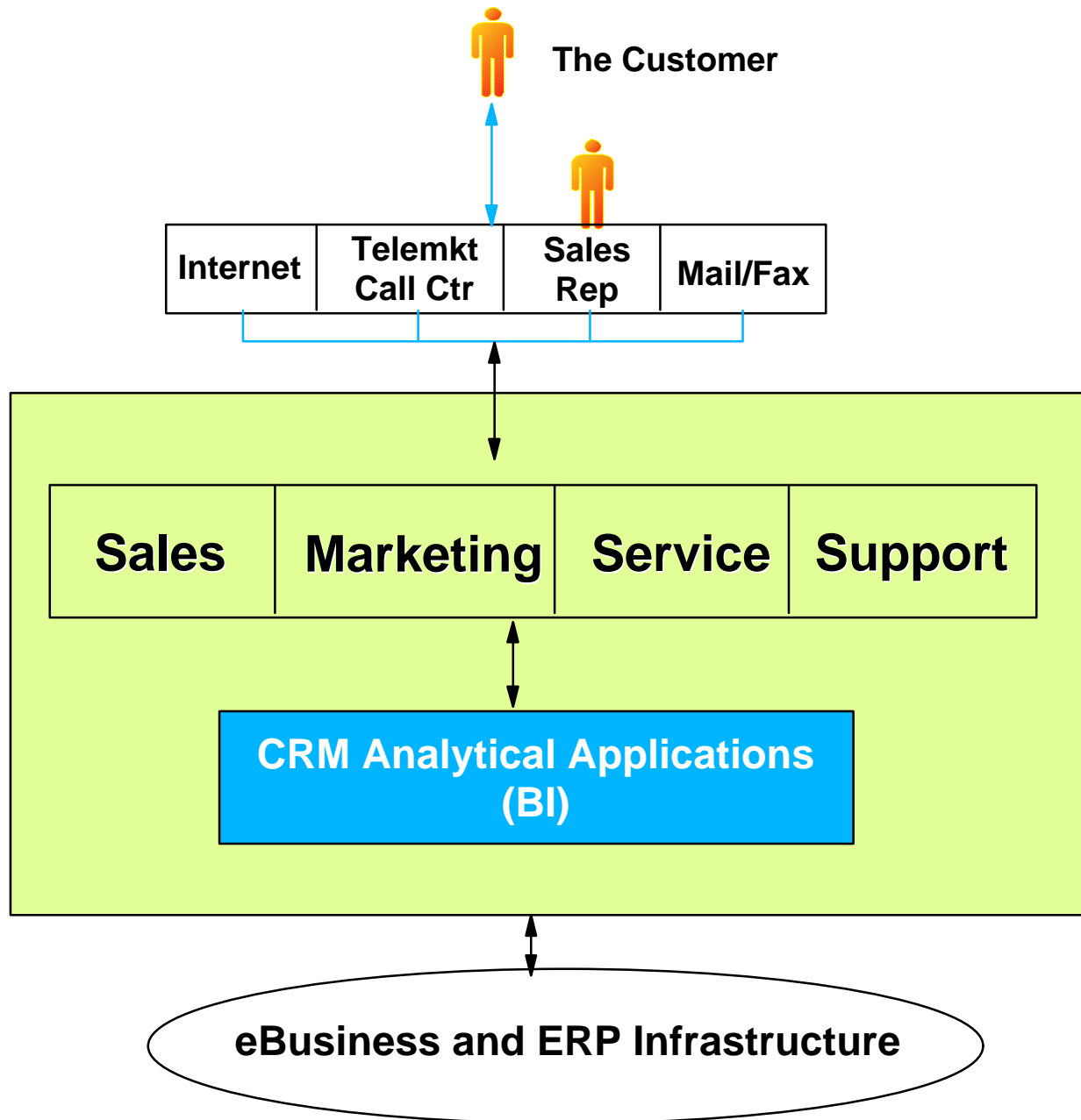
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Appendix - Backup Charts

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CRM Process Integration

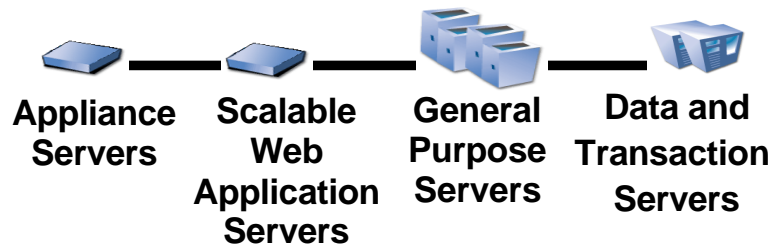


Linux deployed across IBM eServers



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xSeries



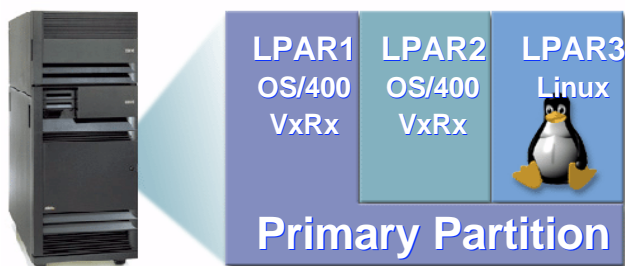
- ▶ Scalable clusters
- ▶ Differentiated through x-architecture

pSeries

- ▶ Native Linux for new solutions
- ▶ Exploit floating point, 64-bit performance, I/O bandwidth and RAS
- ▶ AIX Toolbox for Linux applications in AIX 5L



iSeries



- ▶ Linux partitions integrate applications

zSeries

- ▶ Pure Linux OS
- ▶ Exploits zSeries hardware
- ▶ Scalable, protected partitions
- ▶ Shared infrastructure
- ▶ Reduced cost of ownership



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Elements of eLiza - Self Managing Systems

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Self Configuring

- System can define itself "on the fly"

Self Protecting

- System can protect itself from any unauthorized access anywhere within the network

Self Healing

- System can predict failures and avoid outages by repairing electronically or by replacing components

Self Optimizing

- System automatically manages resources to allow the servers to meet the enterprise needs in the most efficient fashion

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Today's Self-managing Foundation

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- **Self-configuring**

- ▶ Distributed Server Management
- ▶ Integrated xSeries Server
- ▶ Workload Balancing/Job Prioritization
- ▶ Dynamic installation/configuration
- ▶ Dynamic extensible system
- ▶ Self/Auto configuration
- ▶ Auto discovery and update

- **Self-healing**

- ▶ Scalable Cluster Management
- ▶ Memory Scrubbing
- ▶ ECC L1 D cache
- ▶ Dynamic CPU/Memory deallocation
- ▶ Hot swap storage
- ▶ Predictive Failure Analysis (PFA)
- ▶ Lightpath Diagnostic

- **Self-optimizing**

- ▶ Dynamic Workload Management
- ▶ Scalable Cluster Management
- ▶ Monitoring, reporting
- ▶ Management Central monitoring
- ▶ Policy-based workload management
- ▶ LPAR
- ▶ Workload Manager

- **Self-protecting**

- ▶ LDAP
- ▶ Kerberos
- ▶ SSL
- ▶ VPN
- ▶ Digital Certificates
- ▶ Hardware Encryption
- ▶ GSKIT

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@server Competitive Advantages

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pSeries

- 3X performance for 60% of the cost (Other UNIX Servers)*
 - 6-way S80 vs. 16-way E10000 - \$536K vs \$1.3M
- Lower Software Costs (Oracle 2X Cheaper on IBM Servers)*
- Up to 99.999% Availability in HACMP Configuration
 - 6 Minutes of Downtime a year
- Unlimited Scalability and Flexibility
- Native Siebel Development and Support
- IBM Deployment of Siebel uses pSeries/zSeries

zSeries

- Highest Availability in Industry
 - 5 minutes per year of unplanned outages with Parallel Sysplex
- Designed for High Volume Transaction and Database Access
- Dynamic resource allocation for unpredictable Web activity
- Unlimited Scalability - Single Image Clusters (32 Systems, 640 Processors)
- Leverage Existing Skills and Infrastructure
- IBM Deployment of Siebel using zSeries/pSeries
 - pSeries - High Performance Application Serving
 - zSeries - Robust Data>transaction Management and High Availability

*IdeaByte; Giga Information Group, March 17, 2000

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@server Competitive Advantages

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iSeries

- Industry Leading DOMINO and Java Performance and Availability*
 - #1 NOTESBench Performance Leader - April 2000
 - www.ideasinternational.com/benchmark/lotus/mailonlyR5.html
 - #1 Specjbb Bench Performance Leader - April 2000
 - www.ideasinternational.com/benchmark/spec/specjbb2000.htm
- 64-bit Architecture and 64-bit Applications
- Integrated, Turnkey Mid-market Server
- Multiple architecture/application support - OS/400, UNIX, Microsoft Windows NT
- Application consolidation with logical partitioning

xSeries

- x-architecture
- Industry leading TPC-C Clustering benchmark results
- Wide Range of Applications
 - Small to Large, Turnkey to Customer Applications
- Only Intel platform fully integrated with IBM's full @server range
- Server Proven - industry leading compatibility program
- Leading Intel server for Customer Satisfaction

*Ideas International Limited

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