



Don't Blink; You Might Lose Your Vendor, Part 2

by lisa loftis

In part 1 of this series (please visit www.dmreview.com), I highlighted organizational emphasis on integrating customer data, introduced components to build a 360-degree customer view and positioned that enterprise customer integration is becoming a reality; it is also wreaking havoc on existing technology investments. This month I will look at what is causing the chaos and will highlight questions to ask technology vendors when considering a purchase in this area.

The components required in an enterprise customer integration come in three basic categories:

- Traditional customer relationship management (CRM) business applications including sales force automation, help desk and call center, and campaign management applications. Vendors in this space run the gamut from those providing all components in an integrated suite to those focusing on only a single component.
- Customer data integration (CDI) and master data management (MDM) applications are a combination of technologies, tools and processes for defining and maintaining key data subject areas for a company. For integrated customer data, I will focus on the customer subject area, typically the CDI subset. These applications have a hub database of customer information and also include data cleansing and matching tools to detect source system changes and to move information back and forth between the customer hub and the source systems.
- Customer data quality and extract, transform and load (ETL) tools are well known for their deployment in data warehousing applications. They also play key roles in CDI and CRM applications. Quality and ETL tools are often used to load customer information into the traditional CRM business applications, to load data into a customer operational data store and to monitor the quality of data in legacy transaction systems.

What are the issues with this marketplace and the attendant questions these issues should raise?


Questions You Should Ask

There is a clear overlap in functionality between components. The traditional CRM business applications have mini customer data hubs built into their applications. While the enterprise vendors offering the full suite of products have mostly integrated their products around a common customer component, this does not help if you are considering a best-of-breed solution that mixes components from several vendors. When considering a purchase, ask the vendors how open the customer data model is, how extensible it is and how application functionality is updated to incorporate new data elements and relationships. Ask to speak to customers who have integrated their product with others in the space

to get a real-world perspective on the effort involved.

Most of the large CRM business application vendors have recently jumped into the CDI product space. It is unclear how much integration occurs between the CDI hub data model and the mini customer data hubs that form the customer component of the sales force and call center applications. If the industry is true to past form, robust integration between these components may be planned but not quite accomplished. When talking to vendors here, ask how data elements added to the CDI hub are incorporated into the sales force and call center applications and vice versa. Also ask if the interfaces between the matching and merging tools and the databases are the same in the CDI, sales force and call center applications. If different, get a feel for how changes in one application are propagated to the others.

Platform-specific vendors, e.g., IBM and Oracle, are acquiring tools and business applications. In many cases, these acquired tools and applications are not platform or business-application specific and can be deployed across a variety of databases, business applications and hardware applications. IBM's purchase of Ascential (data quality and ETL) and DWL (CDI) and Oracle's purchase of Siebel (CRM) are recent examples of these types of acquisitions. The effort and investment to implement Ascential, DWL or Siebel CRM is substantial, and existing customers of these applications have legitimate questions about what will happen to these products in the future.

Given the state of the industry and its attendant issues, I have developed a wish list of things I would like to see the applications incorporate over the next year. First, all CDI tools (and customer components of the CRM tools, if different) allow configurations to external data cleansing and matching tools, including homegrown ones. That way, you can continue to use the data quality tools that you have already deployed. Short of this, if a vendor forces you to switch tools, the matching and cleansing rules specific to your data should be easily exportable to the tool embedded with the CDI solution. Second, CDI and CRM applications marketed as standalone should come with a way to easily integrate to business applications not of that vendor's making, e.g., DWL CDI allows for integration with Siebel CRM applications. Third, tools and business applications that were not database specific at inception stay that way after acquisition. Fourth, CDI and CRM data models conform to a standard set of customer, relationship and household extended customer definitions - adopted as the standard in the industry - with a configurable set of attributes to extend the definition if required. 

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