



**Industry:** Technology

#### Oracle Applications:

Oracle – Siebel Call Center:

- Call Center
- CTI
- Web Services integration with Lexis Nexis

#### Success Metrics

- Project was completed on-time and within budget
- The CTI integration enables ACS to streamline the enrollee validation process and shorten call times.
- Audit trail functionality allows management to see exactly what was done in the enrollment process regardless of what notes were entered on the account
- Codification of input fields enables better reporting and query capabilities.
- Use of call scripts supports more consistent, higher quality calls and shortens training times.
- Requests for information (both via the Web and call center) are integrated into a back-end mail vendor – saving service representative time and postage costs.
- Paperwork that must be sent for disputes and settlements is also now automated through a back-end mail vendor.

*“eVerge Group consultants have built solid relationships with ACS and really work with us as a team.”*

**Jason Endsley**, Technical Product Manager

# Rapid Siebel CRM Implementation Enables ACS to Support Major U.S. Treasury Initiative

## ACS selected to support U.S. Treasury disbursements program

In early 2007, the U.S. Treasury decided to offer a debit card alternative (Direct Express) for Social Security recipients that did not have bank accounts but still wanted to receive their payments electronically. Cardholders would have 24/7 access to their money at automated teller machines (ATMs) and be able to make purchases at any retailer that accepts MasterCard. Affiliated Computer Services (ACS) was awarded the contract to support the U.S. Treasury's Direct Express card program, the largest debit card program ever awarded in the US. As part of the contract, ACS would need to support all activities related to participant enrollment, transaction processing and dispute resolution. ACS already had a transaction processing system in place due to the state electronic benefit programs they were already supporting. However, because this was the first program that required ACS to handle the enrollment functions, they would need to quickly put a CRM system in place.

## Support system solution needed quickly

ACS was given a very short time period to implement the supporting system (4 months). Because of their track record of delivering successful Siebel CRM implementations for other service offerings within ACS, eVerge Group was selected to develop the CRM application to handle card enrollment and customer support functions. The task was to develop a Siebel CRM solution in 8 to 10 weeks that would allow beneficiaries to enroll for the Debit Express program through a self-service portal, as well as via telephone. The system also had to pass beneficiary information to Lexis-Nexis for authentication and interface with ACS's transaction processing system (EPPIC).

## Application leverages Siebel capabilities

Fortunately, eVerge Group was able to leverage a similar CRM application it had previously built to support another ACS product line. Revisions to that basic platform were made (including call scripts, custom interfaces and management reporting capabilities) to support the Debit Express program. The new system was built to accommodate participant enrollment, as well as handle features like transaction dispute, low balance alert, deposit alert, and ad hoc statements that were required by the U.S. Treasury. CTI capabilities were incorporated to collect and validate enrollees' information via Lexis-Nexis prior to connecting the call with a service agent. Web interfaces were also developed in order to facilitate enrollments via the internet. Finally, eVerge Group utilized Siebel's Web Services Integration module to integrate information flow between the CRM system and ACS's transaction processing system (EPPIC).

## Application delivers as planned

The launch of the Siebel CRM system in early April 2008 was critical to ACS's ability to provide the U.S. Treasury with the infrastructure necessary to support the debit card offering. The system design has enabled ACS to provide superior service while efficiently supporting the management of the program. CTI enables ACS to streamline the enrollee validation process, shorten call times and balance call loads between call centers. Codification of input fields enables better reporting and the use of call scripts supports more consistent, higher quality calls and shortens training times. Requests for information, as well as disputes and settlements, are integrated into a back-end mail vendor – saving service representative time and postage costs. According to Jason Endsley, Technical Product Manager for ACS, “Without Siebel and eVerge Group, we would have had to build a custom application to support this service offering. That would have been impossible to do in the short window we were given, and it would not have been able to handle the IVR and Web interfaces.”