



RiverPoint



Professional Association Optimizes Connection with Members

"The new Enterprise Campaign Management tools are used to consolidate all the communications that our members and potential members receive. The goal is to create a consistent message and experience for all members as they interact with our organization."

Chief Operating Officer

Data Warehouse – A 360° View of Their Member Relationships

Client

A nationally recognized professional association headquartered in Chicago with over 240,000 members and 1,100 employees founded over 150 years ago. This membership organization's work includes the development and promotion of standards within the profession, research and education; a strong advocacy agenda on behalf of its members; and the commitment to provide accurate, timely information and discourse on matters important to the health of America.

Situation

The client wanted to significantly improve its relationship with members and other customers by better understanding its past and ongoing relationship with all members and their representatives. The holistic view of all of the member's interactions will lead to more targeted, relevant messages and offerings to improve customer experiences.

The Association's separate business units fulfill the many different needs of its members with data residing in several disjointed, disparate systems. The client desired to integrate the disparate data into a single all-inclusive view to enable a more robust analysis of the member's entire relationship with the organization. The client was looking for a partner to fulfill the Systems Integrator role for the project with responsibility for:

- Defining a data warehouse strategy and architecture, designing a datawarehouse that integrates data from the key source systems and ancillary data sources, developing the ETL and reports to support a complete view of its members, and a marketing database to support the campaign management activities for membership retention and growth
- Defining requirements, evaluating alternatives, conducting extensive software and vendor evaluations, and recommending an Enterprise Marketing Management tool to support its multi-channel marketing efforts

Thereby allowing the organization to pursue and achieve growth through stronger member relationships by better understanding member needs.

Solution

RiverPoint Group was selected to provide the overall Systems Integrator role on a time-sensitive project basis within an enterprise-critical environment. RiverPoint's responsibility included overall project management, risk management and delivery responsibility for this key enterprise initiative. The initiative was managed as three major projects: the data warehouse implementation project, the campaign management software selection and implementation project, and long-term CRM strategy roadmap.

In the Systems Integrator role, as opposed to an outsourced role, RiverPoint developed a shared responsibility for the delivery of the project with the organization by providing a single interface for all project deliverables, issue resolution, resource coordination and administrative functions for the consulting and internal resources.

RiverPoint's project approach is developed from its proprietary project methodology that identifies the tasks, milestones, deliverables and roles ensuring on-time delivery for critical projects.

For the Data Warehouse initiative RiverPoint provided:

- Project management support including the activities needed to manage and mitigate risk, organize, and control the entire project. Established a new Microsoft Project Server reporting environment for visibility and control.

Data Warehouse – A 360° View of Their Member Relationships

- Identification and confirmation of the business informational needs and user requirements presented to the Steering Committee through project charters and ROI analysis.
- Design and development of:
 - *The data warehouse to consolidate all member demographics, transactions, and relationships from key transactions systems and ancillary data sources.*
 - *The data marts to meet business informational needs with exceptional database performance.*
 - *The processes and programs to load the data warehouse from the legacy source systems.*
 - *The metadata data capture, storage and update processes.*
- Creation of the operational processes and deliverables used to support and administer the data warehouse.
- Implemented a high-performance data warehouse technical architecture including a new DB2 database, Informatica ETL, and Business Objects XI reporting.

The implemented data warehouse integrates data from the key legacy systems and ancillary data sources to enable a more robust analysis of the members' entire relationship with the organization and provides enterprise-wide visibility to that data through business intelligence reports.

For the Enterprise Marketing Management Software Selection and Implementation project, RiverPoint:

- Utilized its proprietary software selection software and methodology that includes the tasks, dependencies and deliverables for a software selection and implementation project.
- The methodology documents and the business process requirements, utilized RiverPoint's experience and market research to identify a short list of viable vendors, facilitating vendor responses to demonstrate how the solution meets the business requirements.
- RiverPoint coordinated the evaluation team responses for software and vendor selection, analyzed the data to provide the consensus viewpoint, gathered the vendor cost and offered alternative solutions for approval.
- Finally, the RiverPoint team implemented and tested the new application, and trained the users in preparation for going live with the new enterprise system.

The Enterprise Marketing Portfolio Management project delivers tangible results that provide enabling technology and processes to help the client achieve its stated goals.

For the long-term CRM Planning project, RiverPoint:

- Provided the Management Advisory Services methodology for developing a long-term plan for their CRM vision.
- Worked with senior management to develop the plan including long-term CRM requirements, a comparative roadmap for CRM lifecycle, gap analysis, and a prioritization approach for a multi-channel CRM enabled organization.
- Presented a long-term roadmap to the Steering Committee.

Benefits

RiverPoint provided the consulting services to support the organization's need to deliver high quality technology solutions and enable their business to enhance its understanding and relationship with members while drastically reducing hard costs and streamlining operational efficiencies.

Benefits include:

- Improved effectiveness by enabling the association to deliver more personal and compelling marketing content to the right members through enhanced understanding of total member relationships.
- Improved efficiency of their marketing operational and modeling processes that streamlined list selection to significantly reduce total cycle time for campaign development.
- Improved communication by providing consistent, accessible information to a wide audience within the association across business functions.

Environment

- Unica Affinium Campaign, Model, and Optimize
- Business Object XI
- Informatica Power Center
- IBM UDB DB2 on Sun Solaris
- Pro Forma Modeling
- Microsoft Project Server



RiverPoint

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