





EXALEAD SEARCH-BASED APPLICATIONS for Financial Services

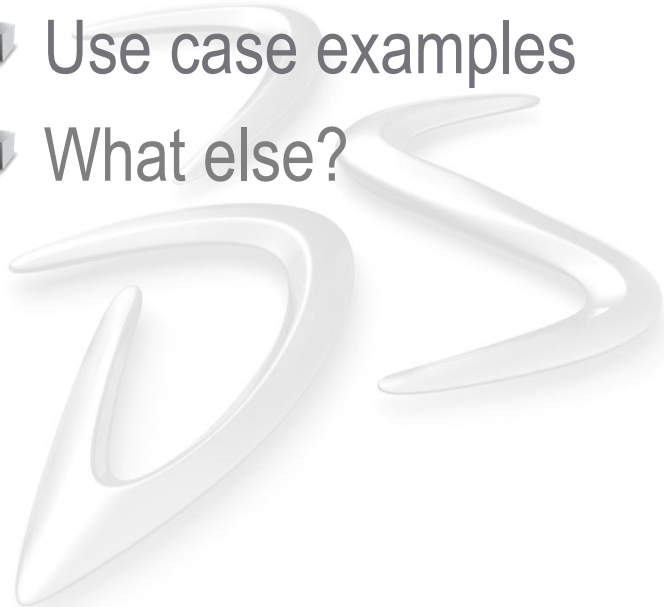


Eric Rogge





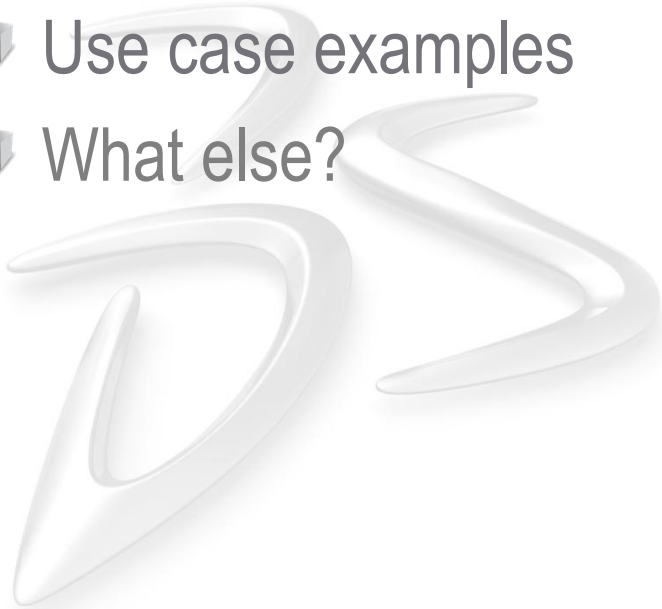
Topics for today

-  Current situation
-  An alternative approach for information access
-  Use case examples
-  What else?



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Business Challenges

Heightened Regulation

- Business process invasive – more detailed visibility and faster reactivity with regulatory information demands
- More stringent requirements for data archiving and security

Customer Expectations Reshaped by Internet + Mobile Experiences

- Financial services customers demand:
 - Efficient 24x7 self-service
 - Multi-channel access: mobile devices, agency/branch, kiosk, PC/Internet

Increased Competition

- Internet banks and non-bank financial institutions
- Non-financial institutions, such as Sears, AT&T, and General Motors

IT View

Data capture options huge and growing

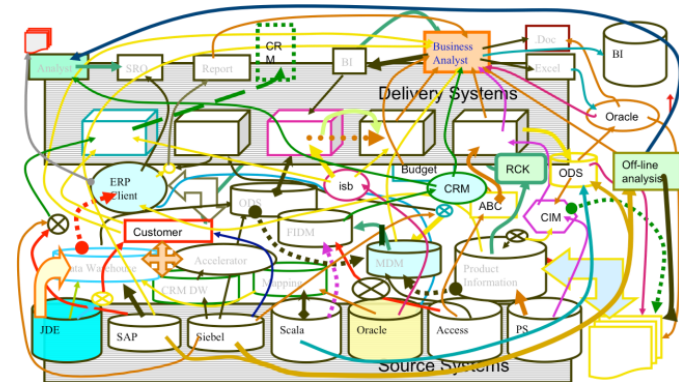
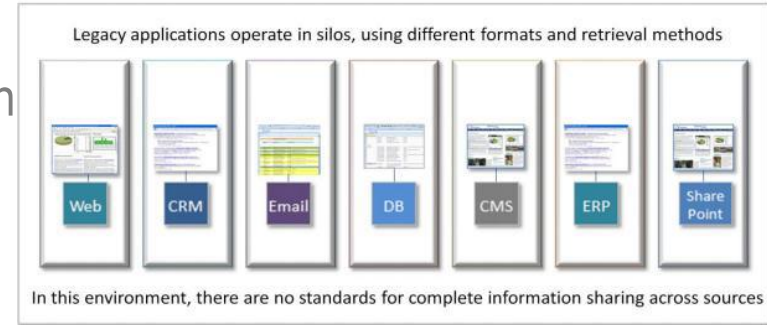
- Not the transaction, but the conversation
- Money Ball writ large
- The Web is the Store

Big data backshop



- Large volume of transactional data
- Massive document collections

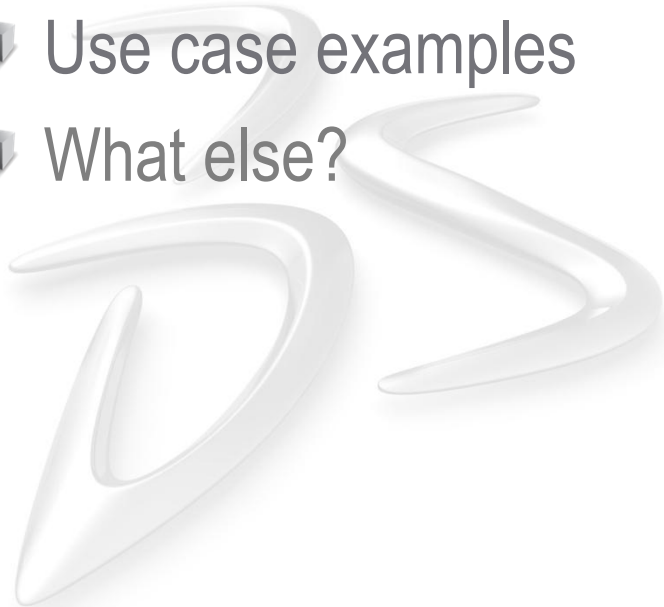
Analyze this!

- Semi-anonymous conversations
- Unstructured data
- Real-time data



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Search-Based Application

Definition

- A **software application** that uses a **search engine** as primary information access backbone and whose main purpose is **performing a domain-oriented task**.
- ...As opposed to locating a document.





Extend CRM Functionality 360°

Salesminer login Search Advanced Search

ACME

Type: [Customer](#)
 Owned by: [France > Sales > Emmanuel Vion](#)
 Family: [Standard account](#)
 Industry: [Manufacturing](#)
 Size: 680 employees
 Annual revenue: 100 000 000 \$
 Rating: [hot](#)
 Connectors: [Filesystem](#), [Email](#), [HTTP](#)
 Description: The Acme Corporation is a fictional corporation that exists in several cartoons, films and TV series, most significantly in the Looney Tunes universe, where it appeared most prominently in the Road runner/Wile E. Coyote cartoons, which made Acme famous for outlandish and downright dangerous products that failed catastrophically at the worst possible times.
 Billing address: 10 Main Rd. 31349 - New York NY USA
 Website: <http://www.acme.com/>
 Open in Salesforce: <https://www.salesforce.com/0/EKTVVO>

Contacts

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+01 555-555-555
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Marketing Manager
+01 555-555-556
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Product Specialist
+01 555-555-557

Opportunities

- Won** [Enterprise Search](#)
258 490 \$
closing: 2008-10-03
- Identified** [Consulting](#)
18 610 \$
closing: 2008-10-30
- Prospecting** [Extended maintenance](#)
56 000 \$
closing: 2008-11-30

Latest events

- 2008-10-28 [Document fetch fails](#) from p.moore@acme.com
On some documents the result links doesn't seem to work ...
- 2008-10-23 [Web 2.0 event with Stephen Kenens](#)
- 2008-10-17 [Call with Stephen Kenens](#)
inbound call re: meeting @ web 2.0 event...
- 2008-10-12 [Acme Packet Showcases Next-Generation Capabilities in 2008 BURLINGTON, Mass., Oct 12, 2008 \(BUSINESS WIRE\)](#) -- Acme...
- 2008-10-08 [Follow Up to meeting with Exalead from c.oates@acme.com](#)
After our meeting last Wednesday, Stephen, Patrick and I met to...

Activity

Documents

- Exalead EN-FR Blogs.ppt**
3) by Carole Offredo 2008-10-19 1854k
2) by Carole Offredo 2008-09-15 1348k
1) by Carole Offredo 2008-08-17 1407k
- 2008-10-06_ACME_Metadata.pdf**
2) by Frank Sevin 2008-10-07 1067k
1) by Frank Sevin 2008-09-29 845k
- Sales offer ACME US281002V3.doc**
1) by Emmanuel Vion 2008-10-06 942k

Global account information extracted from the CRM system

List of events and tasks to complete related to Acme from the CRM, mail databases, websites...

Dynamic ranking based on business rules to present the most relevant information

Search for any information (contact, account, region ...)

Global company information extracted from the CRM

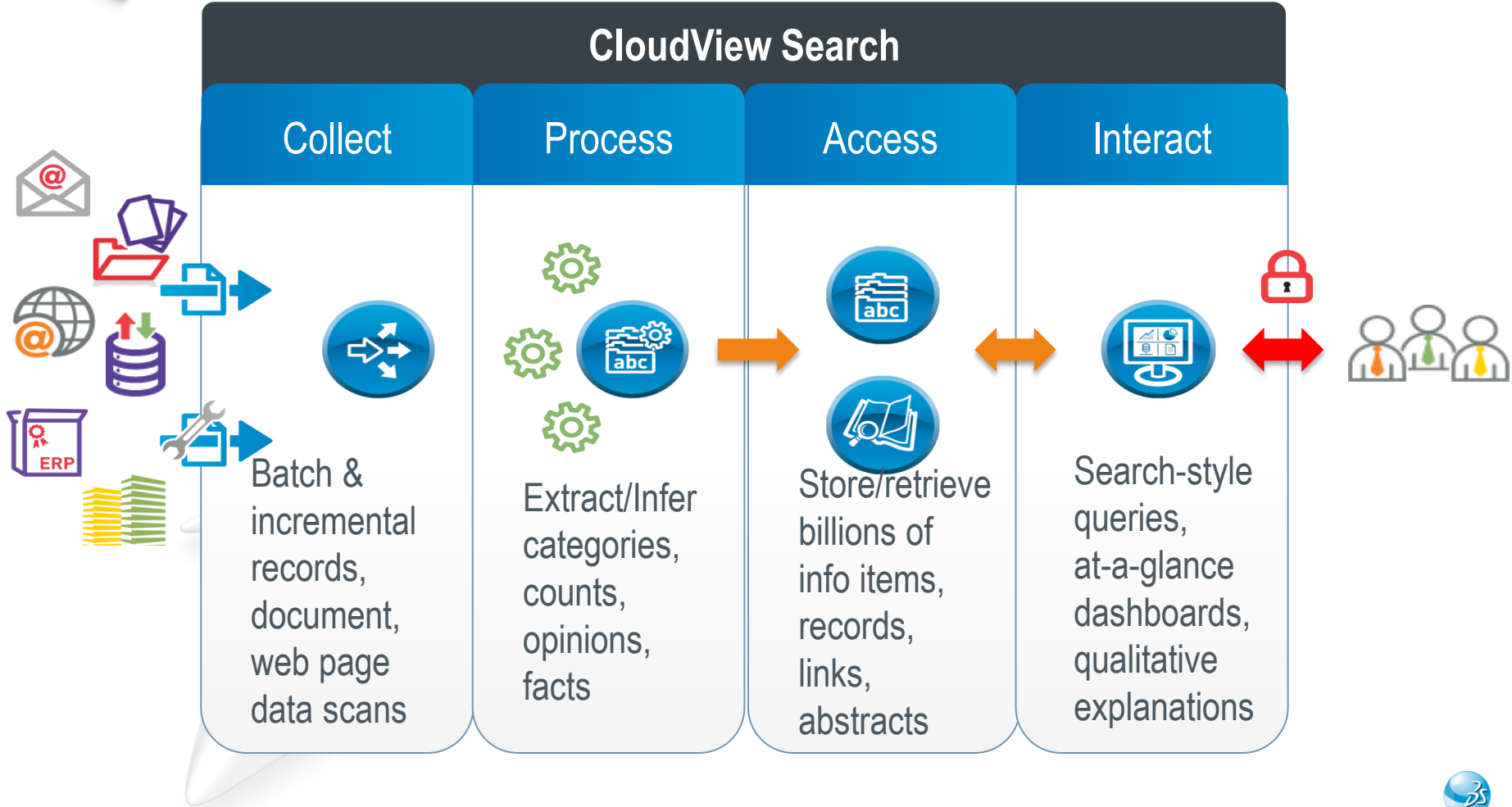
Current status of the opportunities for an account

Related documents hosted on the filesystem of your company





CloudView Search-based App Architecture



Why Have Search-Based Applications?

RDB-Based Application

Search-Based Application

User Adoption



ERP-style UI's require training and limit adoption



Web-style UI's require no training enable viral adoption

UI Development



Inherited Multi-Table/Column Complexity



Inherited Single Index Simplicity

Data Integration



Hand-Built, Rigid Join Relations, "How much" for "What"



Automated, Joins AND Fuzzy Matching, "Why", "Who" for "What"

Data Management



Data Duplication for Performance



Data Indexing for Performance

Data Extraction



Records only







Records, Documents, Web pages, e-mail, Audio, Video, Whatever

Cascading Complexity and Limitations

10 Cascading Simplicity and Agility

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Boost staff efficiency

Company

- ☛ The World Bank

Business Challenges

- ☛ Improved access to information most requested IT improvement
- ☛ Audit revealed staff wasted staff hours in fruitless research activities.
- ☛ Poor satisfaction among staff and external audiences

Overview of Solution

- ☛ Intuitive full-text search
- ☛ Unified Search Portal, Filters...
- ☛ User-friendly interface (no training needed)
- ☛ End user features such as user interface builder, connectors to specified repositories, reporting and management tools
- ☛ Instant display of data: sub-second response
- ☛ 4-5 seconds vs. 10-12 seconds for current search in Country Offices
- ☛ Number of users: 10,000

The screenshot displays the betaSearch interface. At the top, there are navigation tabs: Web, News, People, Projects, Docs & Research, and Reference & Services. Below these, the search bar contains the text 'clean energy' and a 'Search Image Bank' button with a '+options' link. The search results section shows 'Image Bank search results' with 'Results 1 - 10 of about 1,826 matches found'. A 'Major Document Type' section lists categories with counts: Project Documents (995), Publications & Research (744), Publications (129), Economic & Sector Work (93), and Country Focus (15). A bar chart shows the distribution of results from 1961 to 2010, with a peak around 2005. Below the chart, two document results are shown, both titled 'China - Energy Efficiency Financing Project - procurement plan', with report numbers 44371 and 44373, and approval dates of 24-Jun-2008. At the bottom, there are links for 'betaSearch', 'The Search Blog', 'Help', and 'Share your thoughts'.



Improve customer service

Company

- BNP Paribas

Other refs: *Sächsische AufbauBank (SAB), Carife, One of Switzerland's Top 5 Banks, The World Bank...*

Business Challenges

- Structured data in Oracle and BMC Remedy ticketing systems
- Unstructured content in Lotus Notes repositories, spreadsheets, word documents, image files, PDFs, presentations, share drives, etc.
- Myriad, decentralized repositories

Overview of Solution

- 360 degree view of all content (structured & unstructured)
- Maximized IT support center effectiveness
- Reduced time for support ticket resolution from days to hours
- Increased first call resolution rate
- Short time to production with an agile approach
- Low training and incremental hardware costs



The Old Way



The Exalead Way



Determine emerging customer segments...

Company

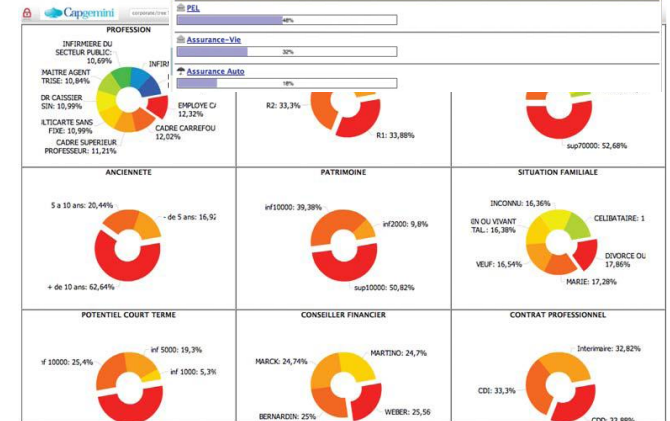
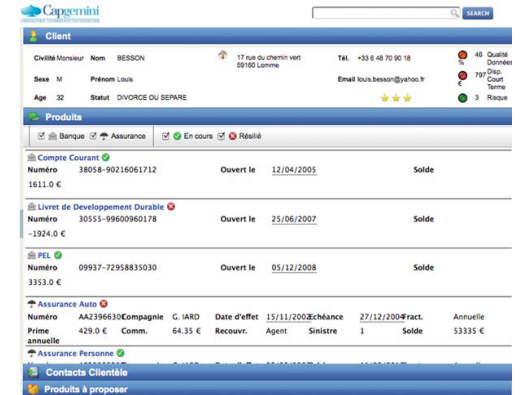
- A large multinational bank

Business Challenges





- Customers information resides in multiple enterprise systems
- Multiplication of channels
- Improve retention rates
- Boost staff efficiency

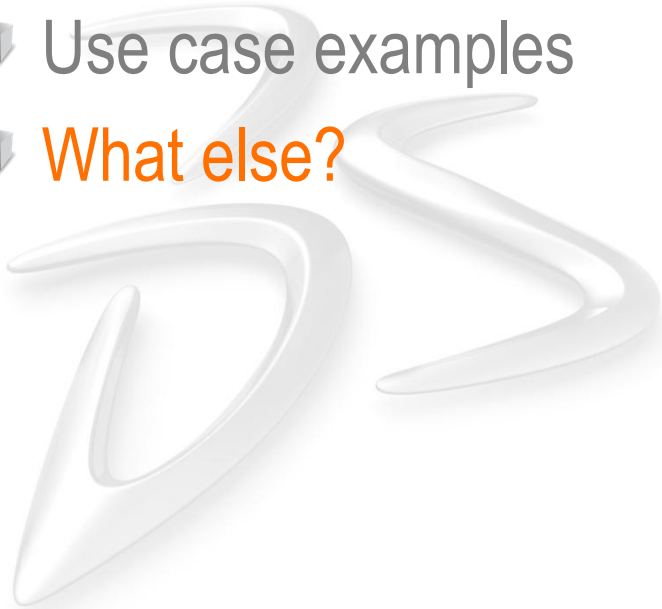
Overview of Solution

- A True 360° Customer View
 - A single access point for all sources & channels:
 - CRM, Call Center, ERP, email, web logs...
 - Simple usage in the style of the consumer Web
 - Completely non-intrusive to source systems
- Automated Sales Guidance
 - Upsell and cross-sell recommendations
 - Risk analysis calculation
 - Campaign planning tools
 - Completely automated and evolves in real time



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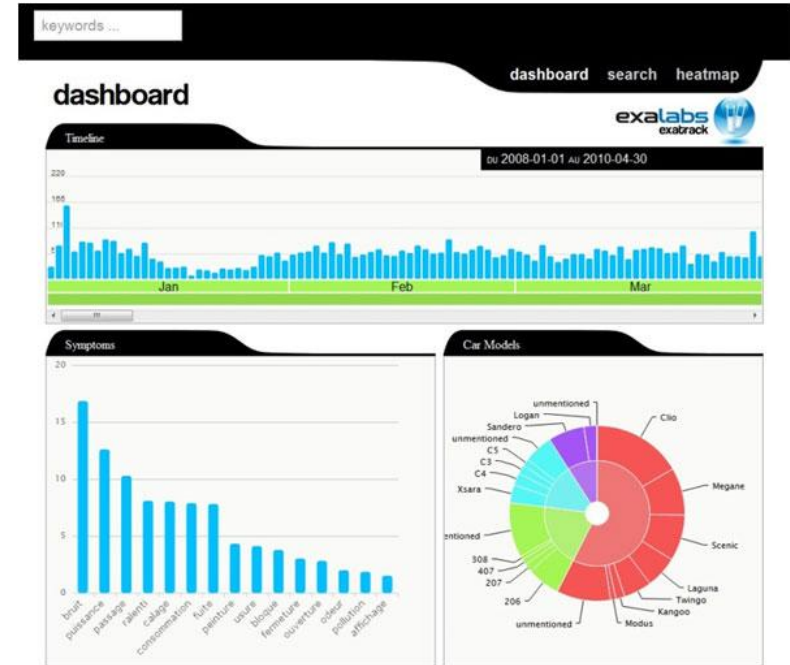
Real-Time Operational Reporting & Analysis

- Gain real-time operational visibility
- Enhance agility in identifying and reacting to exceptions
- Improve day-to-day and long-range decision making
- Extend decision intelligence to a broader base of users
- Prevent fraud & money laundering



E-Reputation/‘Voice of the Customer’ Analytics

- Deeper, timelier understanding of customer needs and trends
- Finer, more accurate customer segmentation
- Proactive crisis management
- Easy integration in engagement workflows
- Easy to understand dashboards (heat maps, charts, graphs, etc.)
- Agile scaling: add or remove sources on the fly with no index rebuild required



Key words or pains that should ring the bell

agile agnostic batch **collaboration** crm customer
dashboard **data** **deploy** different
documents evolutivity federations flexibility
infrastructure interoperability latency mdm migration **millions**
mobility petabytes reconciliation reporting **search** semantic
specifications system tco thousand trace track unpredictable **usage**
users voice **volume** **web**



Exalead Customer Brands



SAL. OPPENHEIM





For more information
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Better know your customer

- Provides a single access point for all customer information sources and interaction channels
- Offers simple usage in the style of the consumer Web
- Enables accurate, high refined segmentation
- Enables a fast, knowledgeable response to customer inquiries and requests
- Enables personalized sales strategies, including automatic upsell and cross-sell recommendations
- Completely non-intrusive to source systems

Client			
Civilité	Monsieur	Nom	BESSON
Sexe	M	Prénom	Louis
Age	32	Statut	DIVORCE OU SEPARÉ
17 rue du chemin vert 59180 Lomme		Tél.	+33 6 48 70 90 18
Email		louis.besson@yahoo.fr	
46		Qualité Données	
797		Disp. Court Terme	
3		Risque	

Produits			
☑ Banque ☑ Assurance ☑ En cours ☒ Résilié			
Compte Courant			
Numéro	38058-90216061712	Ouvert le	12/04/2005
1611.0 €		Solde	
Livret de Développement Durable			
Numéro	30555-99600960178	Ouvert le	25/06/2007
-1924.0 €		Solde	
PEL			
Numéro	09937-72958835030	Ouvert le	05/12/2008
3353.0 €		Solde	
Assurance Auto			
Numéro	AA2396630	Compagnie	G. IA
Prime annuelle	429.0 €	Comm.	6%
		Annuelle 53335 €	
Assurance Personne			
Numéro	AP2396629	Compagnie	G. IA
Prime annuelle	429.0 €	Comm.	5%
		Annuelle 59104 €	

Logs of interactive channels:

Email
IP telephony
ATM
Web sites

