IBM Sales Center for WebSphere Commerce

Rich Operational and Analytic Functionality Lets You Deliver Effective Assisted-Service for Ecommerce

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NETTING IT OUT

Sometimes customers need your help to perform ecommerce activities. They'd like to escalate from self-service to assisted-service in order to complete their work. We call that help assisted-service for ecommerce.

IBM Sales Center for WebSphere Commerce is IBM's assisted-service for ecommerce offering. Sales Center was introduced with IBM WebSphere Commerce V6.0 in May 2006 and is available as a separately orderable add-on. To date, IBM claims that approximately two dozen customers have purchased Sales Center.

On the PSGroup Report Card for Assisted-Service for Ecommerce, IBM Sales Center for WebSphere Commerce exceeds requirements for operational functionality, analytic functionality, and company viability. It needs improvement in channel support.

We recommend IBM Sales Center to every organization that has implemented WebSphere Commerce as the mechanism for delivering assisted-service for ecommerce and a cross-channel customer experience for ecommerce. For those organizations in the process of selecting an ecommerce platform, IBM Sales Center makes IBM WebSphere Commerce a much more attractive choice.

ASSISTED-SERVICE FOR ECOMMERCE

Helping Your Customers Explore, Select, and Purchase Your Products and Services

In our customer service research and consulting practice, we talk about cross-channel, cross-lifecycle customer service. By cross-lifecycle, we mean that customers want and need your help at *every phase of their lifecycles*, from their initial contact with you through their retirement. By cross-channel, we've meant that customers want your help on *every channel* through which they interact with you—the Web and email for self-service, your contact center, stores, and your field service force for assisted-service.

Ecommerce systems use the Web self-service channel to let customers perform activities within the "explore, select, purchase, and maintain" lifecycle phases. They're your self-service Web marketing and sales applications. Most commonly, ecommerce systems let customers learn about your products, compare them, configure them, price them, buy them, and even return them. Ecommerce systems also have account management capabilities. Your customers create ecommerce accounts in order to register their payment methods, shipping methods, and name and address in order to pay for and receive your products.

In Table A, we list these activities within each lifecycle phase in a little more detail.

Customer Ecommerce Activities	
Lifecycle phase	**Customers want to:**
Explore and select	Learn about products and services: features and functions, detailed specifications, warranties and support, prices, promotions, and discounts. Compare similar products and services. Configure products and services. Price products and services and/or get price quotes. Learn about policies in doing business with you for shipment, payment, returns, and support. Determine the availability and lead time of products and services.
Purchase	Checkout and pay for the products and services that they've selected. Select payment methods. Select shipment method. Specify shipping address(es). Cancel orders and order items. Return orders and order items. Get status of orders, payments, shipments, and returns.
Maintain	Establish accounts with you and manage account information. View payments and bills, orders and order histories, returns. Manage payments and bills, orders, and returns. Be aware of upgrades, new products, changes in your business policies, expirations, and promotions. Replenish and/or renew product supplies, service entitlements, or service subscriptions.

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Table A. Typical ecommerce activities that customers perform are listed in this table within their lifecycle phase.

Customers Need Assisted-Service for Ecommerce

Sometimes, customers need assisted-service to perform these activities. For example, your ecommerce system may be missing important services or content around the products in which they're interested such as the detailed description and configurator for a brand-new bundle. Or you don't provide content about replacements and compatibility for products that you're about to discontinue. Or you don't let them change their username online.

At other times, customers need assisted-service because they have difficulty using your ecommerce facilities to perform these activities. For example, they can't find they product they want to buy by using their terminology in your ecommerce search service. Or your product descriptions don't include the information critical to their selection approach like laundering instructions. Or they're confused by the

wording of your "two for" promotion. Or your account registration form has a field that they don't understand.

At still other times, customers need assisted-service because they can't or won't use the Web to do business with you. Telephone assisted-service with your agents is their preferred or only available channel.

Multi-Channel Ecommerce Applications

The best approach to assisted-service for ecommerce is multi-channel ecommerce applications that support Web self-service and Web chat and contact center assisted-service. Multi-channel ecommerce applications should provide role-based access to the data and services that agents need in order to perform the activities for which customers need assisted-service. For example, the customer service agent role should provide the service that lets agents view and update the product, quantity, price, payment, or shipping of any item of any customer's order. It should also provide a service that lets agents view and offer any of the promotions that you've created for a particular product. In addition, multi-channel ecommerce provides role-based access to additional assisted-service capabilities such as changing prices, authorizing returns, and making accommodations.

Extending ecommerce to multiple channels can have bottom-line impact, reducing costs and increasing revenue and making assisted-service for ecommerce a critical component of your customer experience.

Multi-Channel Ecommerce Applications Have Recently Become Available

Recently, ecommerce suppliers have recognized requirements for multi-channel ecommerce. They've expanded the channel support and the customer service functionality of their offerings to implement the assisted-service for ecommerce that we've just described. They offer assisted-service "in the box" as an add-on feature or via integration with an external assisted-service product.

- If your ecommerce supplier offers assisted-service capabilities, then you should seriously consider their implementation in your ecommerce system.

- If you are evaluating new or replacement ecommerce applications, then support for multi-channel ecommerce should be a critical evaluation and selection factor.

We've extended our framework for evaluating ecommerce products to help you make your selection and implementation decisions. The framework is presented and discussed in the next section of this report.

EVALUATING ASSISTED-SERVICE FOR ECOMMERCE PRODUCTS AND SERVICES

We've adapted and combined our frameworks for ecommerce and for cross-channel, cross-lifecycle customer service to create a framework for assisted-service for ecommerce. The top-level criteria of this evaluation framework are listed and described below. The top-level criteria and sub-criteria are shown graphically in Illustration 1.

- **ROLES AND OPERATIONAL FUNCTIONALITY.** Operational functionality makes up the ecommerce activities that your customer service agents can perform on behalf of your customers. In our evaluation of operational functionality for assisted-service for ecommerce systems, we assess the lifecycle activities a product supports and the customer roles that can perform those activities.

- **CHANNEL SUPPORT.** Assisted-service can be delivered across a range of channels. While telephone communication via the contact center is the obvious assisted-service channel, other channels like Web chat are also important. For channel support, we examine which channels a product supports.

- **ANALYTIC FUNCTIONALITY.** You need to be able to measure, analyze, and refine the assisted-service that your agents deliver. Within analytic functionality, we examine and evaluate the collection and presentation of agent behavior and performance information.

PSGroup Evaluation Framework for Assisted-Service for Ecommerce

Assisted-Service for Ecommerce

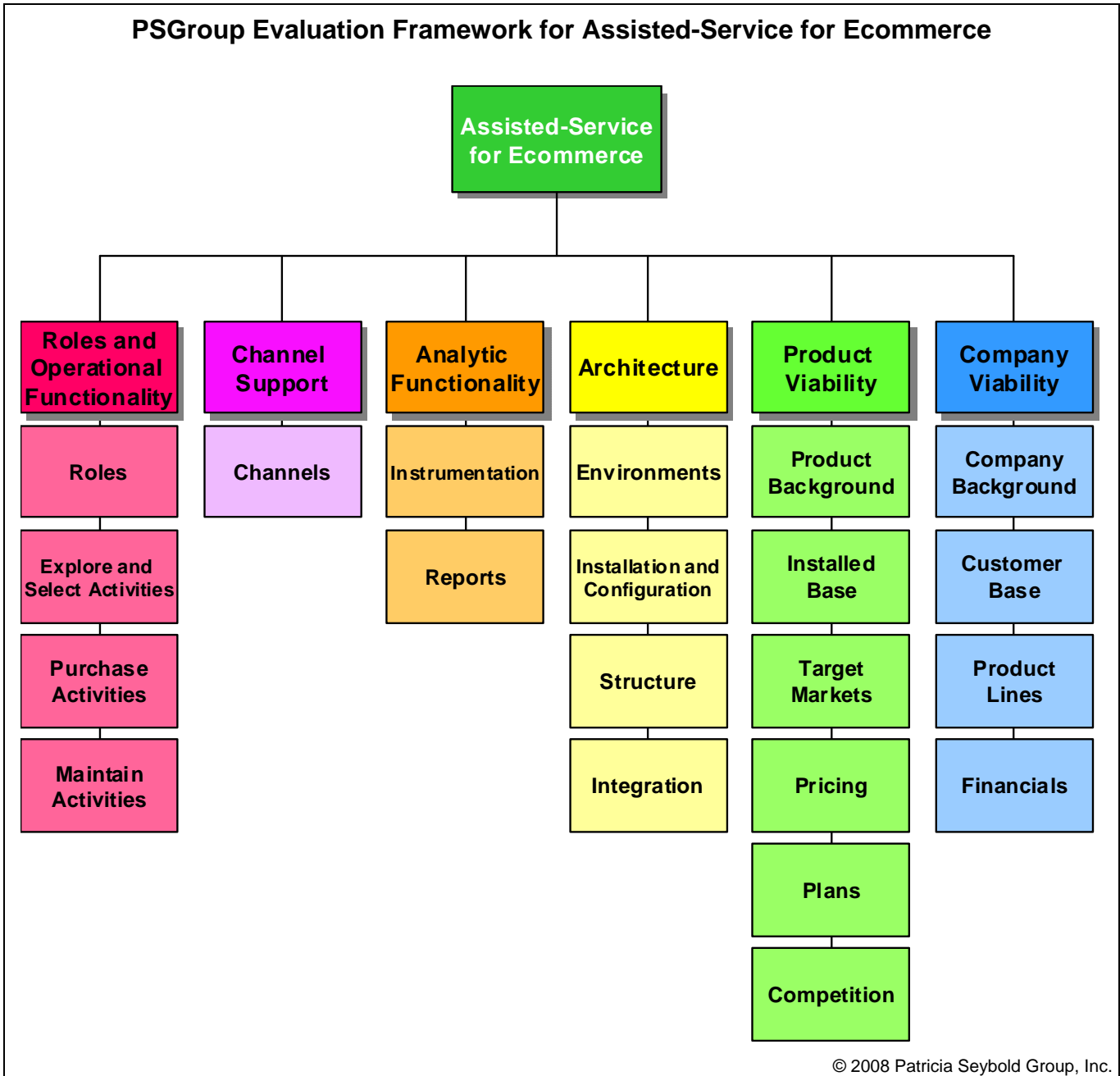| Roles and Operational Functionality	Channel Support	Analytic Functionality	Architecture	Product Viability	Company Viability
Roles	Channels	Instrumentation	Environments	Product Background	Company Background
Explore and Select Activities		Reports	Installation and Configuration	Installed Base	Customer Base
Purchase Activities			Structure	Target Markets	Product Lines
Maintain Activities			Integration	Pricing	Financials
				Plans	
				Competition	

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Illustration 1. This illustration shows the evaluation criteria and sub-criteria of the PSGroup evaluation framework for assisted-service for ecommerce.

- **ARCHITECTURE.** In architecture, we examine the implementation of an assisted-service for ecommerce product in order to evaluate its integrated with your existing ecommerce and customer service systems.

- **PRODUCT VIABILITY.** This evaluation criterion allows us to assess the business and risk in implementing an assisted-service for ecommerce product.

- **COMPANY VIABILITY.** Where product viability examines product-oriented risk factors, company viability examines risk factors with the product's supplier.

We will use this framework to evaluate IBM Sales Center for WebSphere Commerce.

IBM SALES CENTER FOR WEBSPHERE COMMERCE

IBM Sales Center for WebSphere Commerce is IBM's assisted-service for ecommerce offering. "Sales Center" is a separately orderable add-on feature of WebSphere Commerce Professional and Enterprise Editions. It was introduced with WebSphere Commerce V6.0 in July 2006. Its next version will be introduced with WebSphere Commerce 7.0 sometime in 2009.

To date, IBM claims that about two dozen organizations have purchased Sales Center. Most are currently in the deployment process. The organizations are in a range of industry segments and cover a wide range of organization sizes.

Sales Center deploys on an Eclipse-based, rich client platform and uses a messaging approach to access the same WebSphere Commerce data that customers have access to. While agents can also perform the same ecommerce activities that customers perform, the distinguishing feature of Sales Center is the wide range of assisted-service activities that agents can access and perform through its messaging interface. Activities around quote, orders, returns, and customer accounts are very rich. They're key differentiators and the strength of the offering.

ROLES AND OPERATIONAL FUNTIONALITY

Rich, Assisted-Service Functionality

An assisted-service for ecommerce product or add-on feature should have rich functionality, the richer the better. It should support all of the activities that its self-service counterpart product lets customers perform, similar to those we listed in Table A; it should support many of those self-service activities with deeper functionality; and it should support a wide range of additional activities. By deeper functionality, we mean access to data not available to customers, such as product and policy plans and upgrade availability, and access to services not available to customers, such as finding substitute products. By additional activities, we mean, for example, changing prices, canceling orders and deleting order items, processing returns, making accommodations, offering non-standard promotions, and customizing policies.

Assisted-service for ecommerce operational functionality should be authorized for customer service agent/representative and customer service supervisor roles.

Operational Functionality in IBM Sales Center

Operational functionality in IBM Sales Center is organized in a hierarchy of a single Sales center process, two levels of sub-processes, and a broad array of tasks. Tasks correspond to the assisted-service activities that customer service agents perform on behalf of customers. We present this functionality by lifecycle phase, using the customer ecommerce lifecycle phases and activities that we presented in Table A. In Table B, we show the operational functionality of IBM Sales Center for customer activities in their explore and select lifecycle phases. In Table C, we show the operational functionality for the purchase lifecycle phase. In Table D, we show the operational functionality the maintain lifecycle phase. The tables have two columns: "Customer want to" and "Customer service agents can." Below the tables, we provide additional explanation of the functionality.

IBM Sales Center Operational Functionality for Customer Activities in Explore and Select Lifecycle Phases	
Customers want to:	**Customer service agents can:**
Learn about products and services: features and functions, detailed specifications, warranties and support, prices, promotions, and discounts.	IBM Sales Center provides UI and data access mechanisms to retrieve and view all of the product information that is stored in the WebSphere Commerce database.
Compare similar products and services.	IBM Sales Center has operational functionality to let CSRs line up product attributes, descriptions, and images side-by-side in a table and compare them.
Configure products and services.	IBM Sales Center gives CSRs the ability to configure products by selecting product attributes such as color, size, dimensions, warranty, or any custom attributes defined by the vendor. Sales Center ensures the validity of attribute selection through drop-downs. That is, CSRs can create only valid configurations.

Price products and services and/or get price quotes.	• Gather information from customer
	• Work with payment instructions
	• Work with quote attributes
	• Work with quote line items
	   – Enter shipping instructions
	   – Override price
	   – Select product
	   – Work with merchandising
	• Inform customer of quote number and quote expiration date
	• Find quote
	• View quote
	• Submit quote
	• Convert quote to order
	• Cancel quote
	• Clone quote
	• Close quote window

Learn about policies in doing business with you for shipment, payment, returns, and support.	IBM Sales Center does not include operational functionality to support this activity. CSRs would perform it by using the customer facilities of WebSphere Commerce.
Determine the availability and lead time of products and services.	• View inventory allocation

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Table B. We present the operational functionality of IBM Sales Center for the explore and select customer lifecycle phases in this table.

IBM Sales Center Operational Functionality
for Customer Activities in Purchase Lifecycle Phase

Customers want to:	Customer service agents can:

Checkout and pay for the products and services that they've selected.	• Add order comment
	• Block order
	• Unblock order
	• Clone order
	• Find order
	• Gather information from customer
	• Inform customer of order number
	• Save as quote
	• Save shopping cart
	• View order
	• View previous version of order
	• Work with order attributes
	• Work with payment instructions
	• Work with order line items
	   − Choose product
	   − Enter shipping instructions
	   − Expedite the item
	   − Override the item's price
	   − View inventory allocation
	   − Work with merchandising

Select payment methods.	• Work with non order item charges (payment, shipping, handling, etc.) • Update payment instructions and resubmit
Select shipment methods.	• Work with non order item charges (payment, shipping, handling, etc.) • Work with order items (See details above)
Specify shipping address(es).	• Work with non order item charges (payment, shipping, handling, etc.)
Cancel orders and order items.	• Cancel order • Work with order items (See details above)

IBM Sales Center Operational Functionality for Customer Activities in Purchase Lifecycle Phase *(continued)*	
Customers want to:	**Customer service agents can:**

Return orders and order items.	• Create new return request
	• Find existing return request
	• Modify return request
	• Cancel return request
	• Capture return with prior approval
	  – Create ad hoc return request (no existing order)
	  – Create return request
	  – Notify customer about RMA number
	  – Notify customer that order does not exist
	  – Notify customer that the refund will not happen
	  – Receive return request
	• Add ad-hoc items to return request
	  – Find and add catalog item
	• Add order items to return request
	  – Find order
	  – Find order item
	  – Add order item to return request
	• Administer return request
	  – Adjust refund amount
	  – Calculate refund amount
	  – Approve return
	    o Approve automatically
	    o Approve manually
	    o Close return request
	    o Modify return request
	    o Negotiate return (external)
	    o Deny return (external)
	• Determine refund method
	  – Get payment method for return
	  – Look up payment methods in returns Ts&Cs
	  – Select line of credit
	  – Select payment method

Get status of orders, payment, shipments, and returns.	Sales Center provides UI and data access mechanisms to retrieve and view status information from the WebSphere Commerce database.

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Table C. We present the operational functionality of IBM Sales Center for the purchase customer lifecycle phase in this table.

IBM Sales Center Operational Functionality for Customer Activities in Maintain Lifecycle Phase	
Customers want to:	**Customer service agents can:**
Establish accounts with you and manage account information.	• Add customer • Search for customers and examine search results • Select a customer • Determine which customer profile to update • Enable (unlock) customer account • Record customer comments • Reset password • Update address book • Update customer profile information • View contact history
View payments and bills, orders and order histories, returns.	• View order history • View quote history • View return history
Manage payments and bills, orders, and returns.	See order, payment, and return operational functionality in Table C, above.
Be aware of upgrades, new products, changes in your business policies, expirations, and promotions.	• Work with merchandising
Replenish and/or renew product supplies, service entitlements, or service subscriptions.	See order operational functionality in Table C, above.

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Table D. We present the operational functionality of IBM Sales Center for the maintain customer lifecycle phase in this table.

Some explanations of Sales center's operational functionality are helpful. Within the operational functionality for the explore and select lifecycle phases:

• **Gather Information from Customer.** CSRs inquire about the products in which customers are interested and respond to the customer's requests for special processing, if any.

• **Work with Payment Instructions.** CSRs inquire, enter, and review information about how customers would like to pay for their orders.

• **Work with Merchandising.** CSRs can view and sell products related to the products in which customers are interested—up-sell and cross-sell.

• **Submit Quote.** CSRs finalize the guaranteed price for a set of products and indicate that no further changes will be made to that price quote.

Within the operational functionality for the purchase lifecycle phase:

• **Add Order Comment.** CSRs can add comments to orders for future reference. They can send these comments to customers via email.

• **View Previous Version of Order.** CSRs can resume work on an existing order. They can use an existing order to create a new order. They can create an order from a quote. And they also

search for and view all prior orders from a given customer or shipped to a given address.

- **Work with Payment Instructions.** CSR collects, enters, and reviews information about how customers would like to pay for their orders.

- **Look Up Payment Method in Returns Ts&Cs and Select Line of Credit.** B2B relationships in WebSphere Commerce are defined within entities called Trade Agreements. Trade Agreements include terms and conditions (Ts&Cs) for payments and returns. Payments can include lines of credit.

Within the operational functionality for the maintain lifecycle phase:

- **Record Customer Comments.** CSRs can record notes which may be of use in working with the customer in the future. The notes are recorded within the customer profile record.

- **View Contact History.** CSRs can views the history of notes taken about the customer.

Sales Center also has operational functionality that lets CSRs manage customer requests. The product has entities called "ticklers" that represent requests for work that CSRs create to perform on behalf of customers. Tickler-related work comprises these tasks:

- View tickler history

- Create tickler
    – Specify an action object
    – Specify assignee
    – Specify reason
    – Specify remind-on date

- Act on a tickler

- Assign a tickler

- Pick a tickler

- Record an action

Roles in IBM Sales Center

IBM Sales Center supports these two roles:

- Customer Service Representative
- Customer Service Supervisor

Two of the tasks listed in the tables of operational functionality require the Customer Service Supervisor role: unblock order and manually approve return.

Our Take on Roles and Operational Functionality

Sales Center's roles are adequate. Sales Center's operational functionality is excellent. It's the key product strength and a competitive differentiator.

For roles, the issue is that CSR supervisors have only two tasks—manually approving returns and unblocking blocked orders. IBM might consider additional authority for this role. For example, CSR supervisors should also have a role in assigning and escalating ticklers or approving price overrides of greater than a threshold value.

For operational functionality, the activities supported around quotes, orders, returns, and customer are exactly what customers want agents to perform when they call for help. And, despite our issue with roles, the agent that answers the phone has the authority to deliver just about all the assisted-service that a customer needs without making the customer wait for approvals. So, by the time the call ends, the customer has likely had all ecommerce questions answered and all ecommerce problems solved.

The lack of operational functionality for the learning about products and comparing products activities in the explore and select lifecycle phases is not an issue. It doesn't make sense to have agent versions of this functionality. There's nothing an agent should be able to do that customers cannot do in these areas.

Our only real issue with operational functionality is in the area of marketing and merchandising. Sales Center helps agents cross-sell and up-sell. Richer functionality is required. Sales Center should make recommendations to agents for all types of promotions within the assisted-service context. For example, it might recommend a discount through a coupon to a customer who converts a quote to an

order more than a specified time period before the quote's expiration.

The operational functionality around ticklers does not contribute directly to your assisted-service ecommerce experience but tickler activities can be a big help to customer satisfaction. Think of them as the foundation for ecommerce case management. They help ensure that customers get help when agents cannot deliver that help during the first call.

CHANNEL SUPPORT

Multi-Channel

An assisted-service for ecommerce product or add-on feature should be a multi-channel application. It should support all the channels across which your customers want to escalate from the self-service of your ecommerce site. These channels are:

- Telephone
- Web chat

In addition, support for co-browsing can be a useful assisted-service approach, showing your customers how to perform ecommerce activities and, perhaps, giving them the information they need to avoid escalation on their subsequent visits to your ecommerce site.

Channel Support in IBM Sales Center

IBM Sales Center supports the telephone channel. Sales Center can also support Web chat via IBM's Lotus Sametime product; however it must be purchased separately and then integrated with WebSphere Commerce, although the integration is straightforward and well documented.

Channel support is a weak spot in Sales center. We'd like to see broader and more flexible channel support, minimally packaged support for Web chat as well as for telephone.

Interestingly, visiting IBM's www.software.ibm.com Web site in the course of doing our research for this report, we were offered the opportunity to chat with a CSR. The chat invitation dialog showed a "Chat service provide by IBM in conjunction with LIVEperson" footer. IBM does not use Lotus Sametime. See Illustration 2. While these product and technical information pages are not WebSphere Commerce pages, we can't help but wonder why you should purchase, install, and integrate Lotus Sametime when IBM doesn't.

ANALYTIC FUNCTIONALITY

It's critical to measure, monitor, and analyze the ecommerce tasks and activities that your agents perform on behalf of your customers. You use the results of this analysis to refine operational capabilities, thereby improving the customer experience that you deliver. Assisted-service ecommerce products must support this operations-analysis-refinement loop. For example, you should measure the frequency and record the reasons that self-service sessions are escalated to assisted-service so that you can improve your self-service experience and make it easier for your customers to help themselves.

We evaluate these two factors for analysis capabilities:

- **Instrumentation**—collecting, logging, and organizing information for analysis.

- **Reports**—analyzing instrumented information through its selection, formatting, and presentation.

Ideally, an assisted-service for ecommerce product or add-on feature should instrument all customers' activities to escalate to assisted-service and all agent activities performed on behalf of customers. Reports should analyze instrumented data for the entire ecommerce system, for individual customers and individual agents, and for groups of customers and agents. Reports should also cover a specifiable period of time.

Analytic Functionality in IBM Sales Center

We describe the two components of analytic functionality included in IBM Sales Center in Table E. Our analysis follows.

Web Chat Invitation on www.software.ibm.com
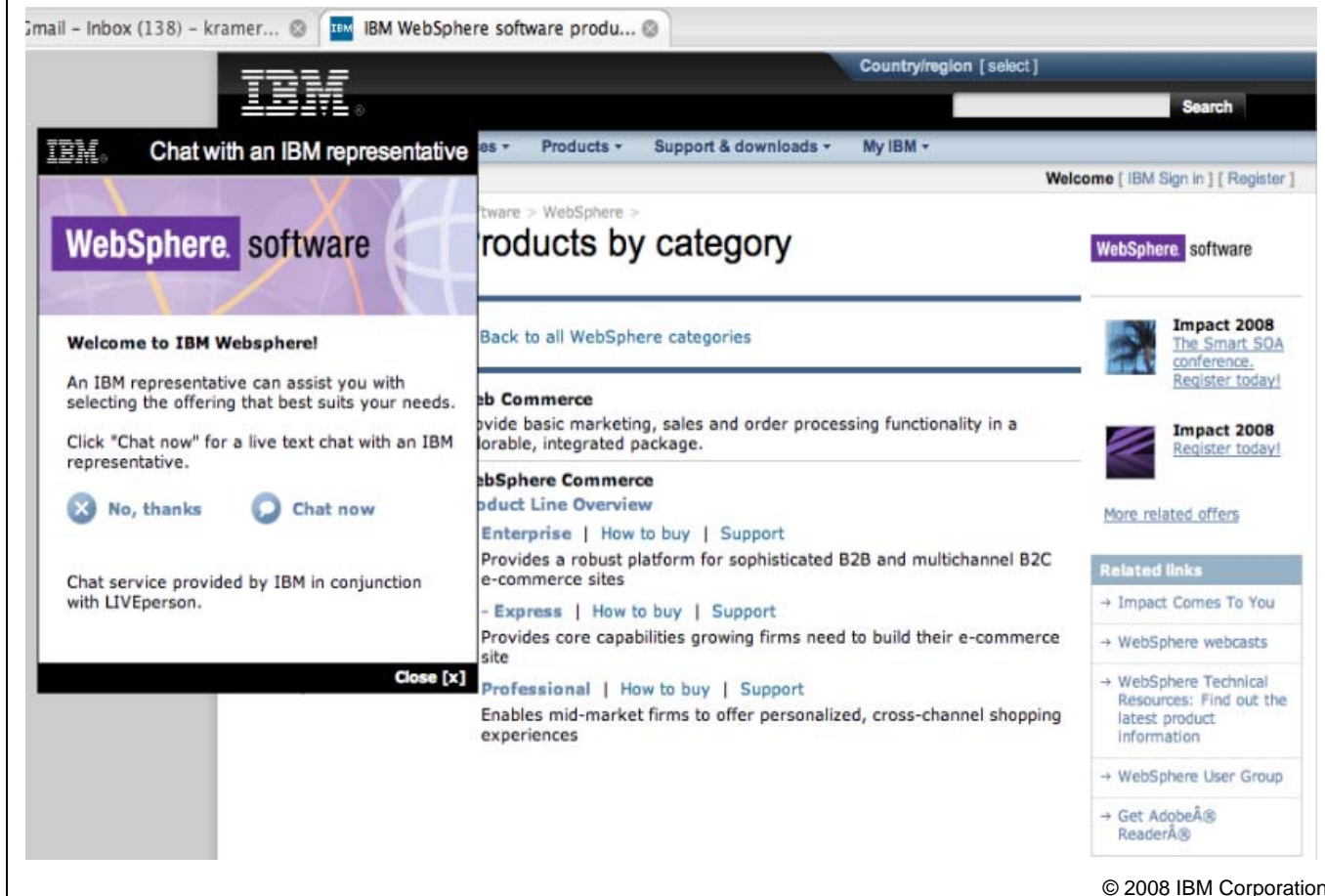
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Illustration 2. This illustration shows a Web Chat Invitation on the IBM Sales Center pages www.software.ibm.com.

IBM Sales Center for WebSphere Commerce Analytic Functionality	
Factor	**Description**
Instrumentation	Sales Center is instrumented by events that are triggered by the actions of customer service agents and customer service supervisors. More specifically, the Sales Center client uses a messaging approach to communicate with the WebSphere Commerce Server in order to perform CSR tasks. Every task generates a message, and every message triggers an event, which instruments the task. Further, analysis and reporting capabilities for Sales Center are provided by Coremetrics, which has created customized reports designed specifically for WebSphere Commerce. Using a Web Service, WebSphere Commerce sends the data instrumented by Sales Center's messaging events to Coremetrics, which collects and organizes it.

You can configure instrumentation by enabling and disabling individual events. Event configuration is a coding task. |

IBM Sales Center for WebSphere Commerce Analytic Functionality *(continued)*	
Factor	**Description**
Reports	WebSphere Commerce's Coremetrics implementation has two sets of reports for analyzing Sales Center activity: channel analysis reports and CSR performance reports.
	These are the Sales Center channel analysis reports:
	• Top Line Cross Channel Report
	• Cross Channel Graphical Dashboard Report
	• Cross Channel Merchandising Report
	• WebSphere Commerce B2B Contract Report (Sales Center data)
	• WebSphere Commerce Promotions Report (Sales Center data)
	These are the CSR performance reports:
	• Team CSR Summary
	• CSR Quotes to Order Conversion Rates
	• CSR Order and Shipping Status
	• Personal Revenue, Profit
	• Price Quotes
	• Price Overrides
	• CSR Category Revenue

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Table E. The analytic capabilities of IBM Sales Center for WebSphere Commerce are described in this table.

IBM Sales center has excellent analytic functionality. Instrumentation is comprehensive. Information about all CSR actions is collected and logged. In addition, you can control the timing and frequency of logging. For example, if you log on-demand, you can analyze Sales Center activity in near real time. The high level reports become dashboards for assisted-service performance, effectiveness, and efficiency. In fact, the Cross Channel Graphical Dashboard report shown in Illustration 3 could be that dashboard.

The predefined reports provide exactly the information you need to analyze and refine the assisted-service that your agents deliver to your ecommerce customers. We especially like the Top Line Cross Channel report (see Illustration 4), the Cross Channel Merchandising report, and the CSR Quotes to orders Conversion Rates report (see Illustration 5). The cross channel reports let you monitor and analyze the complete multi-channel ecommerce experience that you deliver to your customers.

ARCHITECTURE

Architecture defines how assisted-service for ecommerce products is built, how they work, and how they're deployed. Architecture is a very important factor in evaluating assisted-service products and add-on features. It determines how easily they can be implemented within your ecommerce and customer service environments.

Cross Channel Graphical Dashboard Report
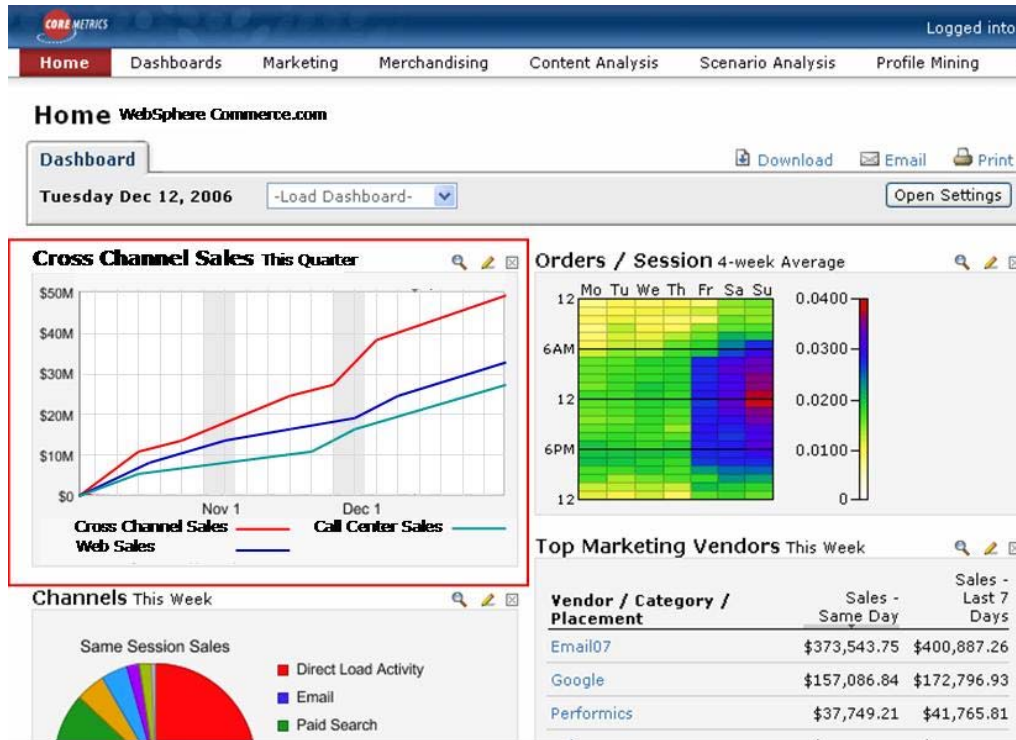
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Illustration 3. This illustration shows an example of a Coremetrics Cross Channel Graphical Dashboard report for IBM Sales Center.

Top Line Cross Channel Report

Promotion Name / Promotion Code	Sales	Web Sales	Call Center Sales	Orders	Web Orders	Call Center Orders	A
⊕ ▦ Register and Save	$ 253,780.00	$177,646.00	$ 76,134.00	1,547	1083	464	$
▦ Spring Catalog 4565	$ 144,344.00	$101,040.80	$ 43,303.20	880	616	264	$
▦ Call Center 5435	$ 11,002.00	$ 7,701.40	$ 3,300.60	67	47	20	$
▦ E-mail Blast 6547	$ 98,434.00	$ 68,903.80	$ 29,530.20	600	420	180	$
⊕ ▦ Free Gift with $500 Purchase	$ 78,494.00	$ 54,945.80	$ 23,548.20	479	335	144	$
⊕ ▦ Free Shipping	$ 53,494.00	$ 37,445.80	$ 16,048.20	326	228	98	$

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Illustration 4. This illustration shows an example of a Coremetrics Top Line Cross Channel report for IBM Sales Center.

CSR Quotes to Orders Conversion Rates

WebSphere Commerce Sales Center – CSR Quotes to Orders Conversion Rate provides information on quotes and quote conversion

Full Report Trend Rows 2 selected (10 max)   ✔ Add to Favorites   📄 Download   📧 Email   🖨 Print

February 2005 Feb 1, 2005 - Feb 28, 2005 ▾ ▦ -Load View- ▾   [Open Settings]

Search by CSR name [   ] [Go]

CSR Team Name / CSR ID	CSR Name	Quotes Created	Quotes Converted to Orders	Conversion Rate	Sales Converted From Quote	Quotes Outstanding Value	Quoted Value
Totals		**755**	**320**	**42%**	**$ 488,575.00**	**$ 520,170.00**	**$ 1,008,745.00**
West		116	48	41%	$ 103,452.00	$ 83,540.00	$ 186,992.00
sgatto	Steve Gatto	39	21	54%	$ 31,000.00	$ 15,540.00	$ 46,540.00
csmith	Carol Smith	32	17	53%	$ 28,474.00	$ 22,000.00	$ 50,474.00
tkoehler	Tim Koehler	45	19	42%	$ 43,978.00	$ 46,000.00	$ 89,978.00
Central		210	97	46%	$ 129,844.00	$ 156,000.00	$ 285,844.00
East		286	132	46%	$ 156,844.00	$ 178,090.00	$ 334,934.00
Unassigned CSRs		143	69	48%	$ 98,435.00	$ 102,540.00	$ 200,975.00

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Illustration 5. This illustration shows an example of a Coremetrics CSR Quotes to Orders Conversion Rate report for IBM Sales Center.

From the perspective of your ecommerce environment, the assisted-service product or add-on feature should be a configuration option. It should be installed and/or upgraded as part of the standard procedure for installing and/or upgrading your ecommerce product. It should share and extend self-service ecommerce data, content, UI content, and services. External assisted-service products should also share and access ecommerce data, content, UI content, and services.

From the perspective of your customer service environment, the assisted-service for ecommerce product or add-on feature should integrate into the environment and structure of your agent desktop and should integrate with your customer service application portfolio.

In order to evaluate the architecture of assisted-service for ecommerce products and add-on features, we'll examine their configuration and installation procedures, their internal structure and implementation, and agent desktop integration approach.

IBM Sales Center Implementation

IBM Sales Center has two components: the IBM Sales Center client and the WebSphere Commerce Server. They communicate through Web Services-based messages. The Sales Center client sends requests for the execution of tasks. The WebSphere Commerce Server responds with the results of task execution.

IBM built the IBM Sales Center client on a rich client platform (RCP) using the Eclipse SWT (Standard Widget Toolkit) Layout architecture.

The UI is organized into a set of perspectives, which are workspaces designed to give agents all the tools they need to help customers perform activities associated with a particular type of business entity—quotes, orders, returns, customers, and ticklers. When agents start up the Sales Center application, the order perspective is presented to them. (See Illustration 6.) Agents will likely be spending most of their time helping customers with orders.

Customization

Most customization of Sales Center will be at the UI. Given the UI's Eclipse SWT implementation, your customization effort will require Java programming and manipulation of XML files. However, IBM provides a declarative interface to SWT that lets you can customize widgets, fonts, colors, and other look and feel characteristics. The interface is XML, and it's implemented within the XML files that specify plug-ins (plug-in.xml) for the UI.

Order Perspective
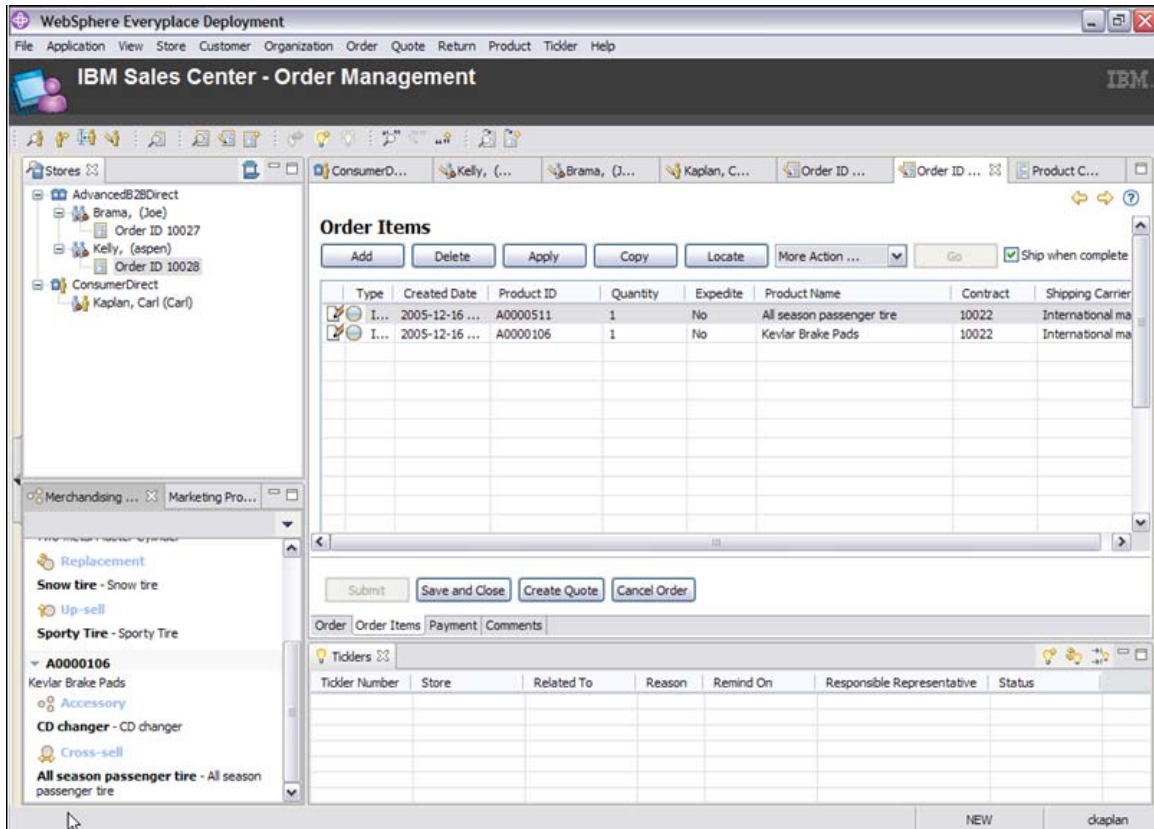
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Illustration 6. This illustration shows the order perspective, a workspace that gives agents all the tools they need to help customers perform activities related to orders. When agents start up the Sales Center, this application displays the order perspective.

To facilitate customization further, IBM provides reusable sample components of layouts in plugin.xml files with the distribution of the product.

Samples are included for actions, dialogs, editors, and requests. We list the samples for each in Table F.

Plug-in Samples for the IBM Sales Center UI	
Sample type	**Sample**
Action	• Create Customer Action
	• Create Customer Dialog Action
	• Create Customer Dialog Workbench Action Delegate
	• Create Customer Workbench Action Delegate
	• Edit Customer Action
	• Edit Customer Workbench Action Delegate

Plug-in Samples for the IBM Sales Center UI *(continued)*	
Sample type	**Sample**
Dialog	• Create customer dialog
Editor	• Customer Address Page • Customer Editor • Customer Name Page • Customer Page
Request	• Create customer request

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Table F. The analytic capabilities of IBM Sales Center for WebSphere Commerce are described in this table.

GLOBALIZATION/LOCALIZATION. The Sales Center UI supports globalization/localization through Properties files that externalize text strings from the Java code of the UI. Per the Java UI standard, Properties files are created for the default locale and language, and you can create additional Properties files for each additional locale and language pair that you'd like to support. Note that English is the default IBM Sales Center locale.

Properties files are the standard approach to localization for Java programs. While this approach is reasonable, IBM gives WebSphere Commerce clients a higher-level, easier to implement localization approach that would have been a nice feature in Sales Center. On the other hand, the requirement for globalization/localization is not as important for the CSR UI as it is for the customer UI.

Integration

As a rich Java client application, Sales Center gives you the facilities of Java for integrating external applications. In fact, Sales center uses Web Services as its messaging interface with WebSphere Commerce. However, we feel that integration between Sales Center and external applications is not a significant requirement. The major requirement for integration with external applications is between WebSphere Commerce and back-end application and supply chain applications. That's a topic for our report on WebSphere Commerce architecture, although we know that WebSphere Commerce offers very good integration facilities.

Because it has such rich operational functionality, the key requirement for integration with Sales Center is at the UI. The best practices approach for the agent UI is a window for Sales Center, another window for WebSphere Commerce's browser-based customer UI to perform activities like learning about products, and one or more UIs for your other customer service systems—the systems that support other phases of your customers' lifecycle, especially the install and use phases. Application to application integration of these disparate customer service systems does not make sense because the systems have widely diverse functionality.

PRODUCT VIABILITY

You want to purchase an assisted-service for ecommerce product or add-on feature that is well proven and widely used for your type of business. You also want a product that you can implement within a budget and schedule, and a product that will continue to be able to address your requirements in future versions. In other words, you want a viable product.

As we do in all of our evaluations of software products, we consider the business aspects of assisted-service for ecommerce products and add-on features in the product viability section of our framework. A product's viability is much easier to

evaluate than its operational functionality, channel support, analytic functionality, or architecture, but the factors that contribute to product viability can be real deal breakers. For example, a product may be targeted for industry segments other than the ones in which you do business. A product may be brand new with no reference customers in companies similar to yours. Or the product's price might break your budget.

We've identified six factors in evaluating product viability. They are:

- Product background
- Installed base
- Target market(s)
- Pricing
- Product plans
- Competition

In Table G, we describe the product viability of IBM WebSphere Commerce Sales Center. Our analysis follows.

IBM WebSphere Commerce Sales Center Product Viability		
Factor	**Description**	
Version history	Version: IBM Sales Center for WebSphere Commerce Version 6	Date: July 2006
Development approach	Sales Center is designed and developed by the IBM WebSphere Commerce development team at its Toronto lab.	
Target markets	Sales Center has the same target markets as WebSphere Commerce. Given its per user pricing, the product feature has been attractive to large and small organizations for both B2C and B2B applications in both the Americas and Europe. Most implementations have been B2C across a range of retail sub-segments.	
Installed base	IBM claims that more than approximately two dozen organizations have purchased and are in various stages of deploying Sales Center.	
Price	IBM offers Sales Center as an add-on module to WebSphere Commerce. Sales Center has a per-user pricing model, and IBM sells it in packs of 10 users for a list price of $16,500 per 10-user pack.	
Plans	IBM plans to introduce WebSphere Commerce Version 7 in 2009, and Sales Center may be updated at that time, although specific new features and enhancements have not yet been determined.	
Competition	• IBM WebSphere Commerce Sales Center faces competition from other ecommerce products that include customer service functionality. ATG Commerce Support Center is the closest competitor. Its operational functionality is focused on B2C ecommerce. • IBM WebSphere Commerce Sales Center also faces competition from CRM systems that provided account/customer management functionality and integration with back-office systems.	

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Table G. Product viability factors for IBM WebSphere Commerce Sales Center are listed and described in this table.

Our Take on IBM WebSphere Commerce Sales Center Product Viability

Sales Center is a relatively new offering with a small installed base. Those are factors that can raise product viability concerns. Two factors mitigate those concerns. The first is Sales Center's relationship as an add-on feature to WebSphere Commerce. WebSphere Commerce is a widely used and well proven product that is and has been, for more than 10 years, among the leading ecommerce systems available. Sales Center is also built and maintained by the same R&D team that builds and maintains WebSphere Commerce. The second factor is the reality that all assisted-service for ecommerce offerings are relatively new and have small installed bases. In fact, Sales Center is one of the more widely used offerings.

Other than product maturity and installed base, Sales Center's product viability is quite good. It's developed and maintained by the WebSphere Commerce R&D team, and its release plan is synched up with the WebSphere Commerce release plan. Sales Center's price is quite attractive—$1,650 per agent seat, and that's the list price. Those of you with large contact centers for ecommerce can expect to pay significantly less. Competitively, operational and analytic functionality give Sales Center an edge over just about all the assisted-service for ecommerce products that we've seen.

COMPANY VIABILITY

You want to purchase a viable product or add-on feature from a viable company. A viable company is a going concern with increasing revenue, profits, numbers of customers, and numbers of products.

We consider the business aspects of the supplier company of assisted-service for ecommerce products and add-on features in the company viability section. Company viability is a little more difficult to examine than product viability because it's more subjective and it's more difficult to obtain source information. For example, what is the effect of a company's age on its viability? Also, because private companies are not required to disclose their financials, it's virtually impossible to assess financial health.

We've identified four factors for examining company viability. They are:

• Company background
• Product lines
• Customer base
• Financials

IBM is absolutely a viable company. So much so that we do not examine and analyze company viability factors for it.

THE BOTTOM LINE

IBM Sales Center for WebSphere Commerce has rich operational functionality and comprehensive analytic functionality. It supports CSR and CSR supervisor roles. Its rich client platform is a practical approach for architecture and implementation that recognizes the realties of the CSR desktop and UI. Channel support is the only limitation and it's by no means a showstopper.

We recommend IBM Sales Center to every organization that has implemented WebSphere Commerce as the mechanism for delivering assisted-service for ecommerce and a cross-channel customer experience for ecommece. For those organizations in the process of selecting an ecommerce platform, IBM Sales Center makes IBM WebSphere Commerce a much more attractive choice.

In Table H, we summarize our evaluation and analysis in the PSGroup Report Card on IBM Sales Center for WebSphere Commerce.

PSGroup Report Card on IBM WebSphere Commerce Sales Center			
Evaluation Criteria	**Evaluation**	**Key Strengths**	**Key Limitations**
Roles and Operational functionality	Exceeds requirements	Rich operational functionality, especially for processing quotes, orders and returns	
Channel Support	Needs improvement		Web chat requires purchase, installation, and integration of Lotus Sametime No support for co-browsing
Analytic functionality	Exceeds requirements	Comprehensive instrumentation Excellent reports and the potential for real-time reporting and dashboards	
Architecture	Meets requirements		
Product Viability	Meets requirements		
Company Viability	Exceeds requirements	IBM is absolutely a going concern	

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Table H. The PSGroup Report Card on IBM Sales Center for WebSphere Commerce summarizes our analysis and evaluation along the major criteria of our framework for customer self-service.

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MITCHELL I. KRAMER is a Senior Vice President and Senior Consultant at the Patricia Seybold Group. Kramer currently focuses on customer relationship management technology, architecture, and analytic applications as well as the computing infrastructure and information technologies that support this customer-centric domain. Kramer applies his experience and expertise to help customers evaluate, compare, and select CRM products and develop approaches toward successful implementation. Product vendors continue to leverage Kramer's skills and insights to develop product requirements, to better understand the competitive environment, and to assist in planning and delivering marketing programs.

Kramer draws on his extensive primary and secondary market research in the architecture, design, evaluation, and selection of enterprise-wide distributed computing infrastructures. In consulting engagements, Kramer often uses the technology frameworks he's developed with corporate IT organizations to help them with architecture and product selection decisions. He frequently works with companies to help them determine product requirements, market and product positioning, competitive analysis, and customer satisfaction. Kramer has successfully managed company launches, product introductions, and business and product repositioning. He has also developed and documented business plans for raising capital and for mergers and acquisitions.

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The CEO and founder, Patricia Seybold, is the _New York Times_ best-selling author of _Customers.com_ and _The Customer Revolution._ Patty's latest book, _Outside Innovation,_ is now available.

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