Anatomy of a Siebel Archiving Project

6 Basic Principles to Consider

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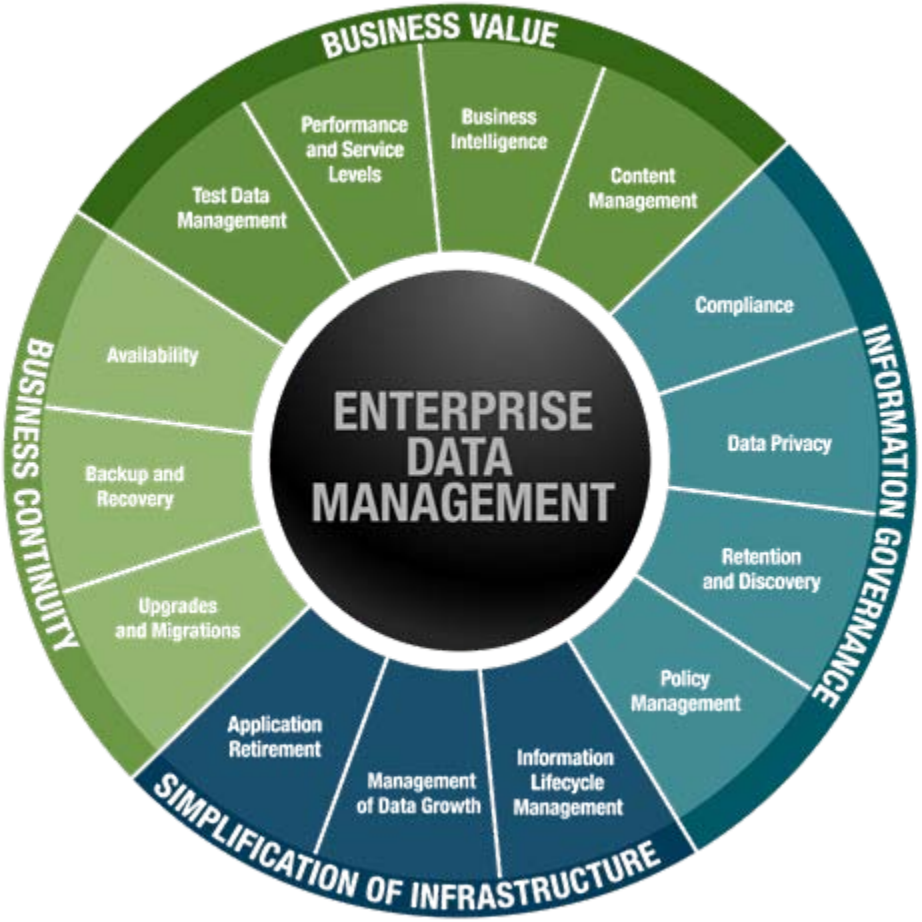
What is Enterprise Data Management?



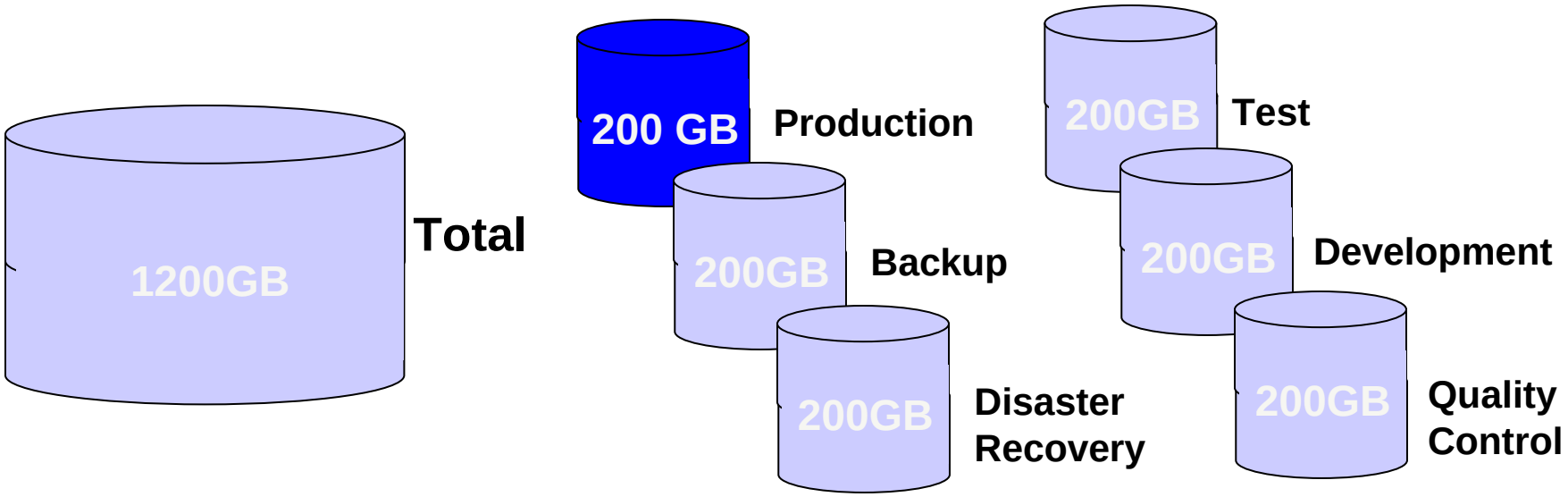
- Processes and technology for managing mission critical application data throughout its lifecycle

Explosive Database Growth

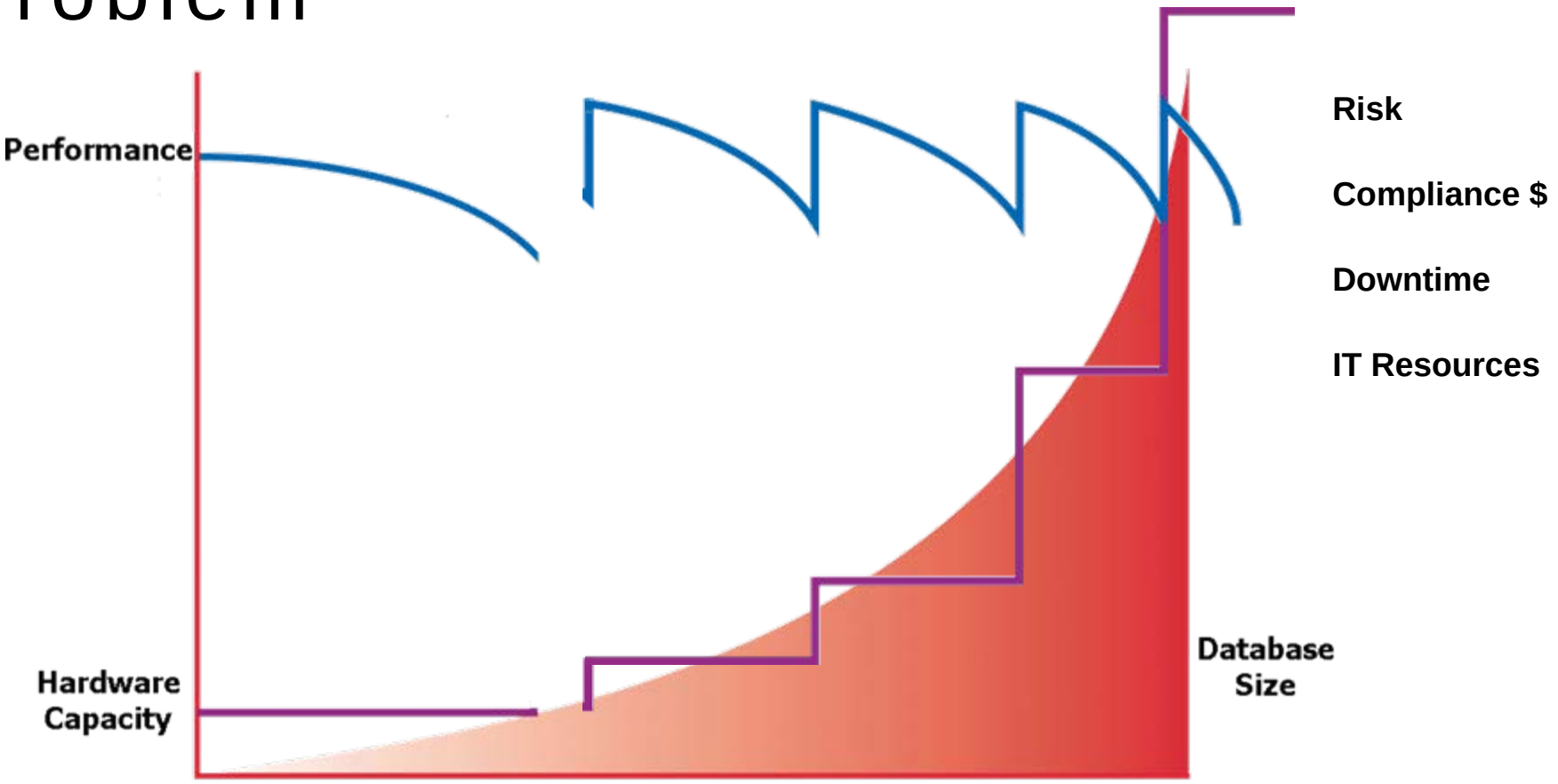
- Mergers & acquisitions
- Organic business growth
  - eCommerce
  - ERP/CRM
- Records retention:
  - Healthcare – HIPAA
  - Pharmaceutical – 21 CFR 11
  - Financial – IRS and SEC Rule 17a-4
- Data multiplier effect
- **According to industry analysts, annual compound growth rates for databases will exceed 125%**

Data Multiplier Effect

Actual Data Burden = Size of production database + all replicated clones



The Ongoing Problem



How many copies?

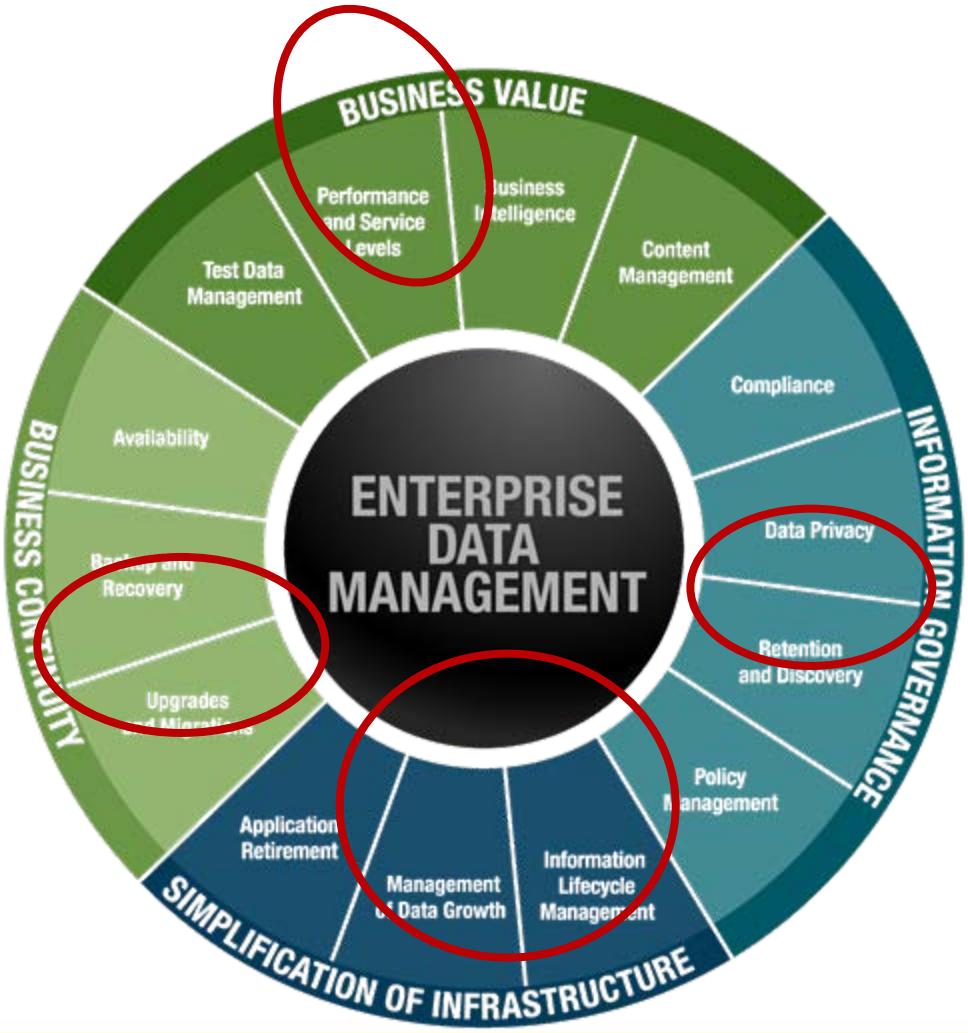
Analysts Projections

- A new ESG report, "Digital Archiving: End User Survey and Market Forecast 2006-2010," regarding their purchasing intentions for archiving solutions.
  - 48% of organizations say they will purchase and deploy a database archiving application within the next 24 months
  - An additional 35% say they expect to purchase a database archiving application at some point beyond 24 months.
  - Database-resident information will be the fastest growing type of archived information between now and 2010, growing at a CAGR of 79%. **Over 4000 Petabytes of database archives will exist in 2010.**
- **The database archiving market will grow at a CAGR of 38.5 percent through 2009- Gartner**

What to do?

- Industry Analysts recommend data archiving as a best practice for managing data growth
- But, why should I archive?

Addressing The Challenges



- **Key challenges for Siebel sites**
  - –Performance and Service Levels
  - –Data Growth Management
  - –Upgrades and Migrations

How can archiving help?

Why Customers Need Archiving – Drivers

Business

Compliance/Risk
- Driven by SOX, HIPAA, etc. (regulations).
- Records retention requirements.
- Business process compliance.
- Litigation support.

Cost Reduction
- Reduce overall storage costs.
- Minimize associated labor and administration costs.
- Improve disaster recovery processes.

Information Innovation
- Provide access to historical data.
- Mine information for unique value.
- Enhance business for competitive advantage or organizational improvement.

IT

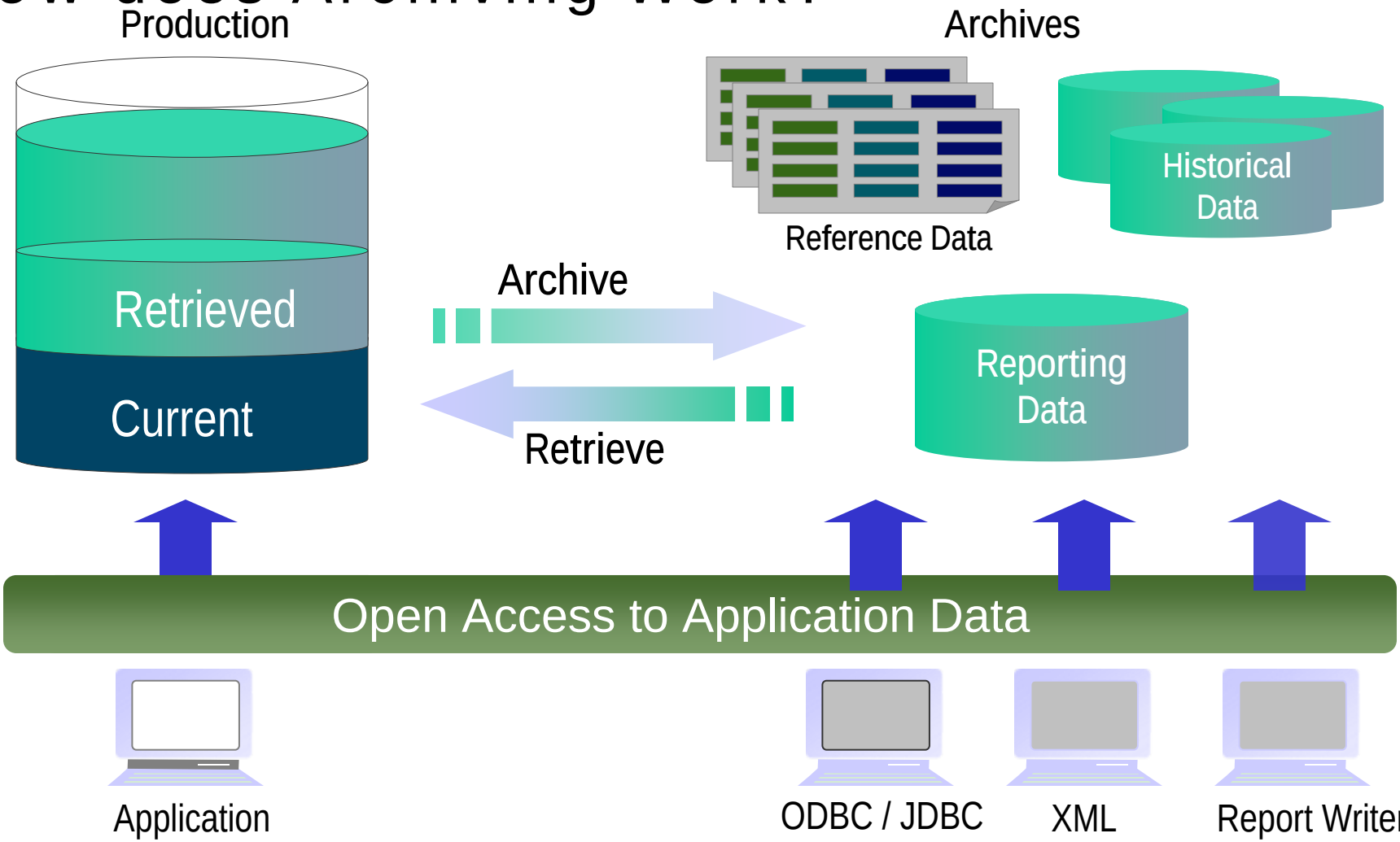
Systems Efficiency
- Reduce high cost storage.
- Reduce backup & recovery resources.

User Productivity
- Remove inactive data to improve application performance.
- Reduce backup & recovery time.
- Improve application availability.
- Easy access to historical/enterprise data.

Customers Are Asking Archiving Questions

- What data should I be saving, for how long and for what reasons?
- What data should I be deleting?
- How am I going to find the data when I need it?
- What do I do with the data when I no longer need it?
- What is the most appropriate solution to meet my archiving needs?
- What is the cost/benefit analysis to support an archiving solution acquisition?

How does Archiving Work?



Siebel Archiving Business Drivers

Manage application performance and data volume growth cost effectively.

Ensure regulatory compliance by maintaining data needed for potential audit.

Minimize data required to upgrade.

Why Archive?

- **CRM systems are designed to capture huge volumes of customer data. Excessive data leads to:**
  - System response times degrading
  - Backup and recovery times escalating
  - Storage and data management costs skyrocketing
  - Upgrades being longer, more complex and more risky

These factors negatively affect ROI for your Siebel system

Siebel Archiving Solution Requirements

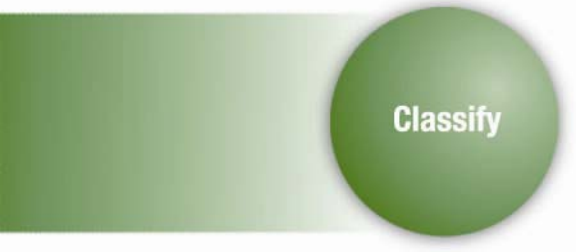
- Archive subsets of Siebel data
  - Complete business object
  - Audit-ready “snapshot in time”
- Delete inactive, historical data from production
- Archive associated attachments from file system
- Locate and browse archived data

6 Basic Principles for Archiving Siebel Data

1. Assess

- Determine application types
  - Mission critical
  - Business critical
  - Targeted for sunset
- Decide where to locate the archive
  - Which storage devices
  - When to deploy each type
- Determine access requirements
  - Who, what, how, when?

2. Classify



- Identify “Business Objects” to archive
  - Historical reference snapshot
  - Examples: Activities, Service Requests
- Determine retention requirements
  - Cross functional consensus
  - Time value of business object
  - Deletion requirements
- Identify post-archive use cases
  - Customer service inquiries, audit, e-discovery, trend analysis
  - SLA for access
  - Retrieve from archive
  - Reload to temporary DBMS

Classification Example

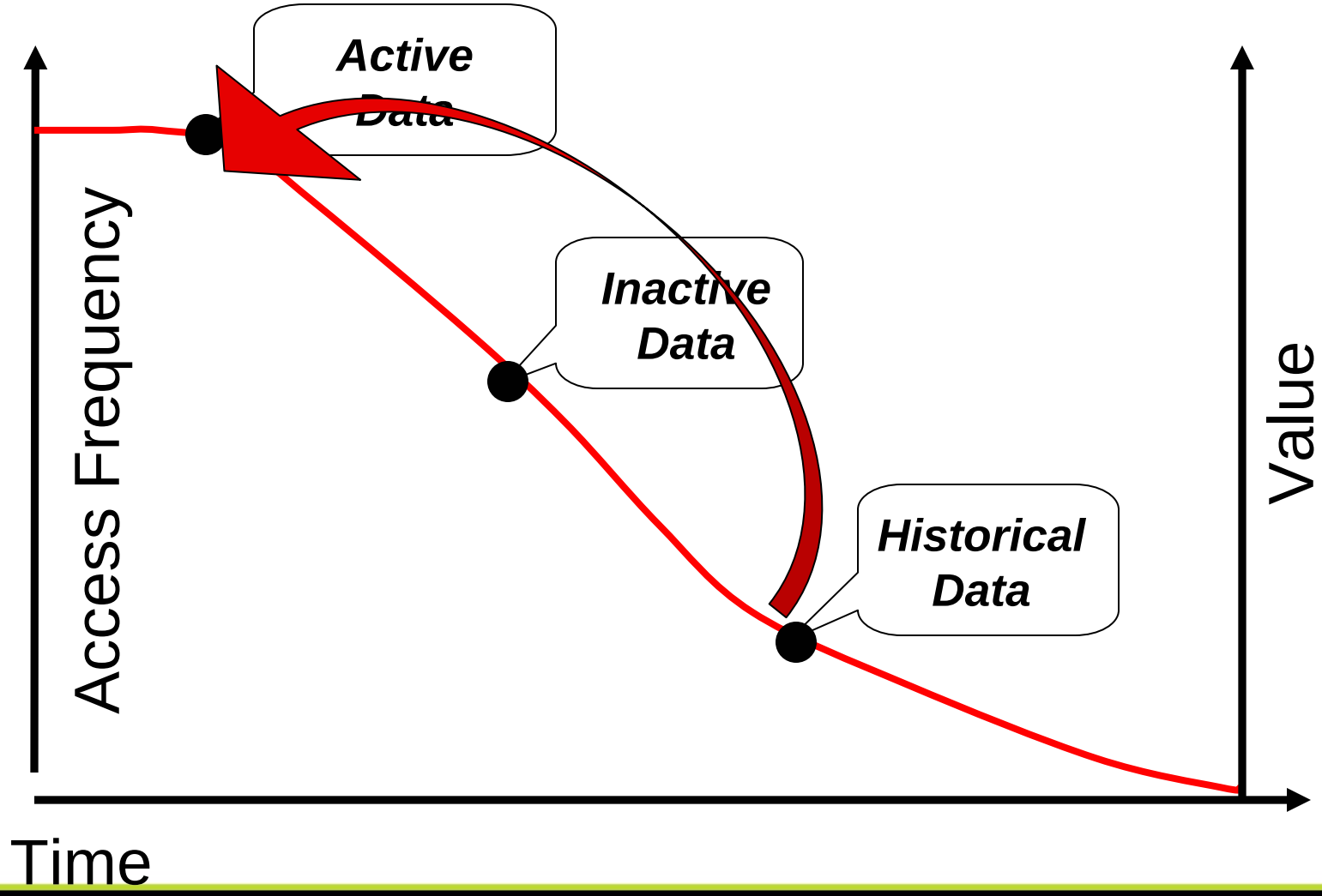
Service Request Status	Opened 2006	Opened 2005	Opened 2004	Opened Pre-2003
Unscheduled	578	32		
Scheduled	2,356	211		
Pending	322	3		
Open	5,093,750	456,542	1,211	21
Open – DN Call Back	3,245	211	23	
In Progress	123,552	23,475	4,695	939
Closed	36,383,928	32,485,650	29,005,045	53,654,629
Cancelled	3,768,637	3,364,854	3,004,334	5,557,531

Note: Data in table represents actual scenario.

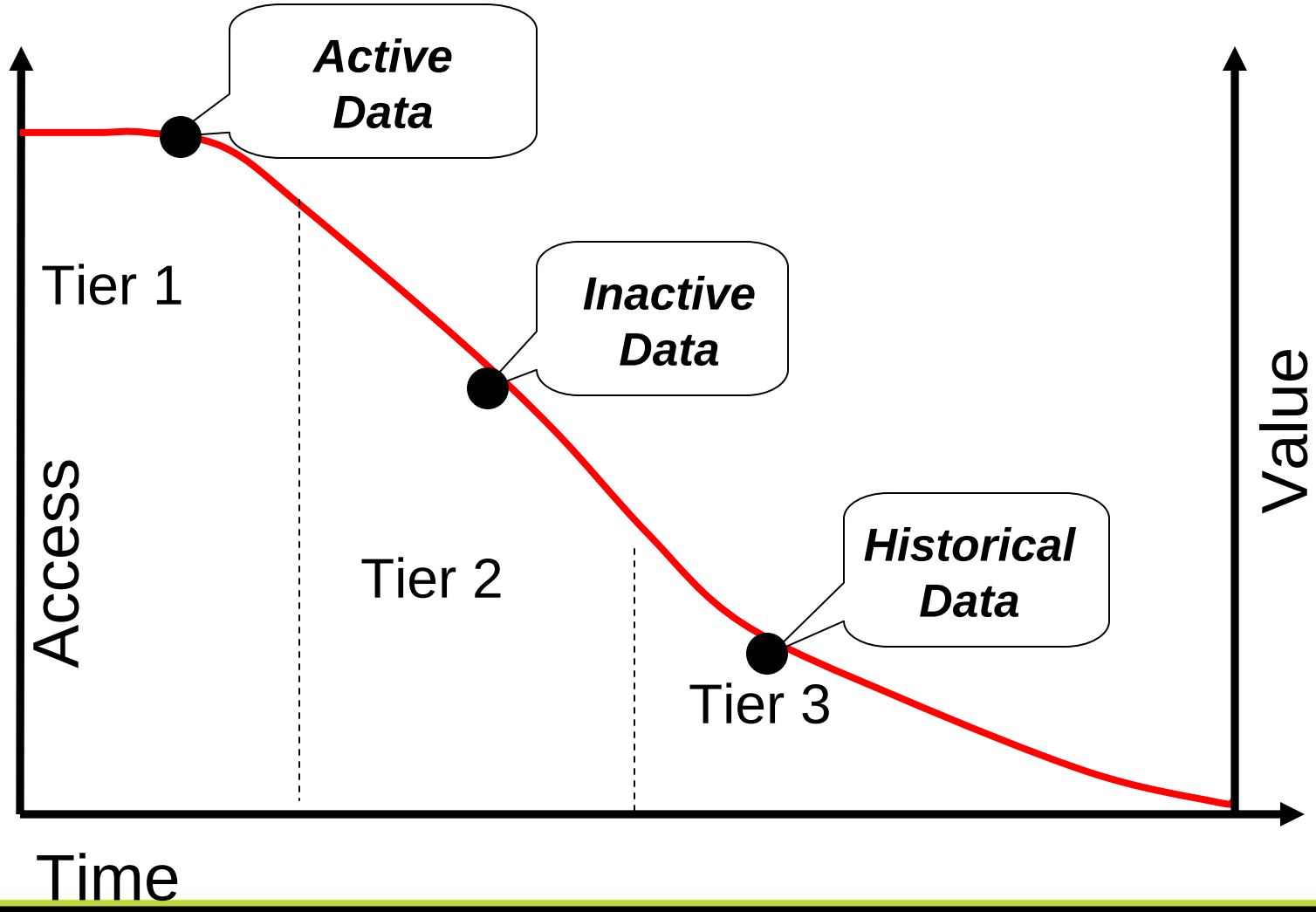
3. Archive

- Determine operational practices
  - Frequency of archive
  - Automated or manual operations
  - Online or offline
- Define file management
  - Across storage tiers
  - Manual or integrated (Tivoli, Symantec, etc.)

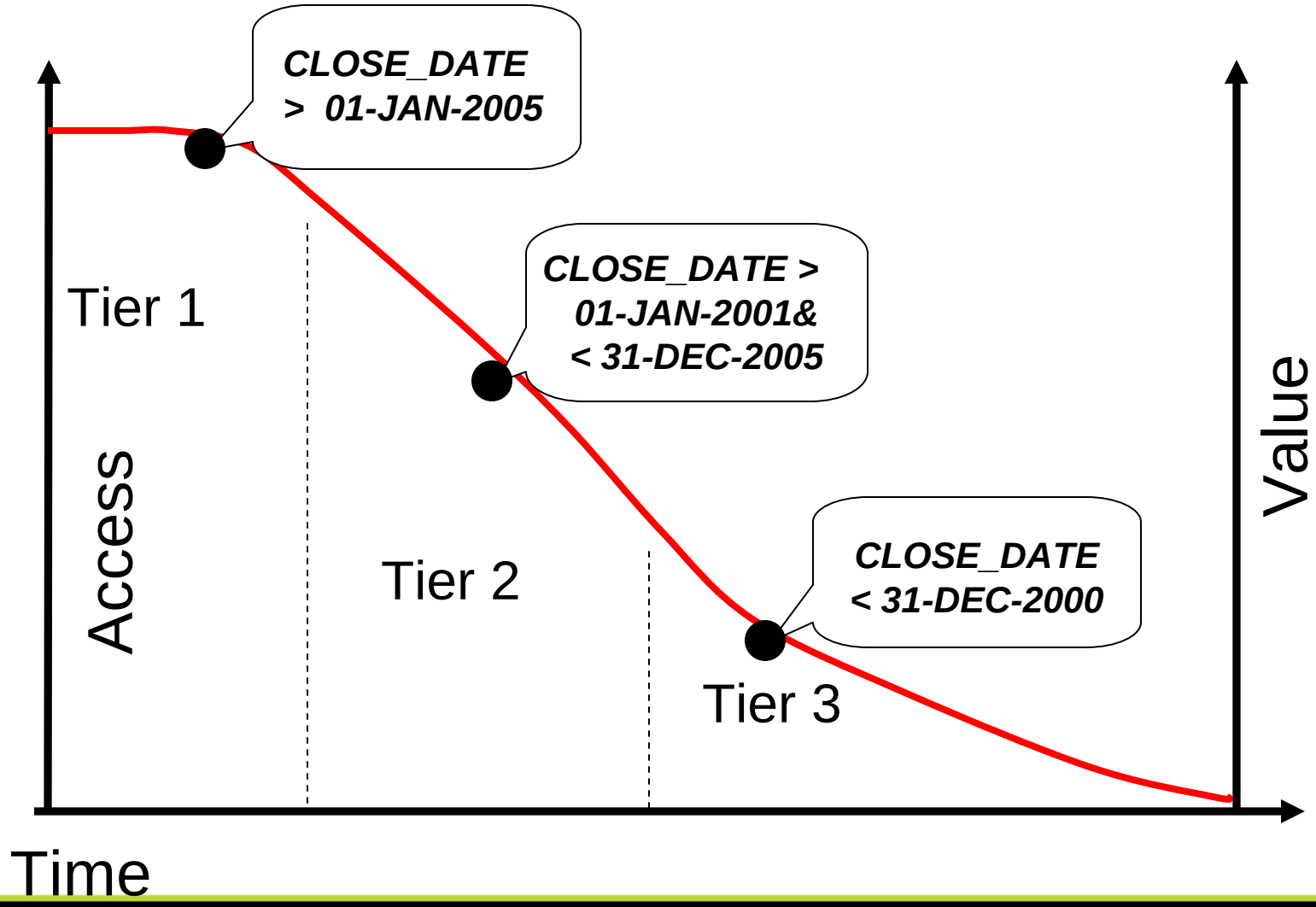
Evolving Business Value



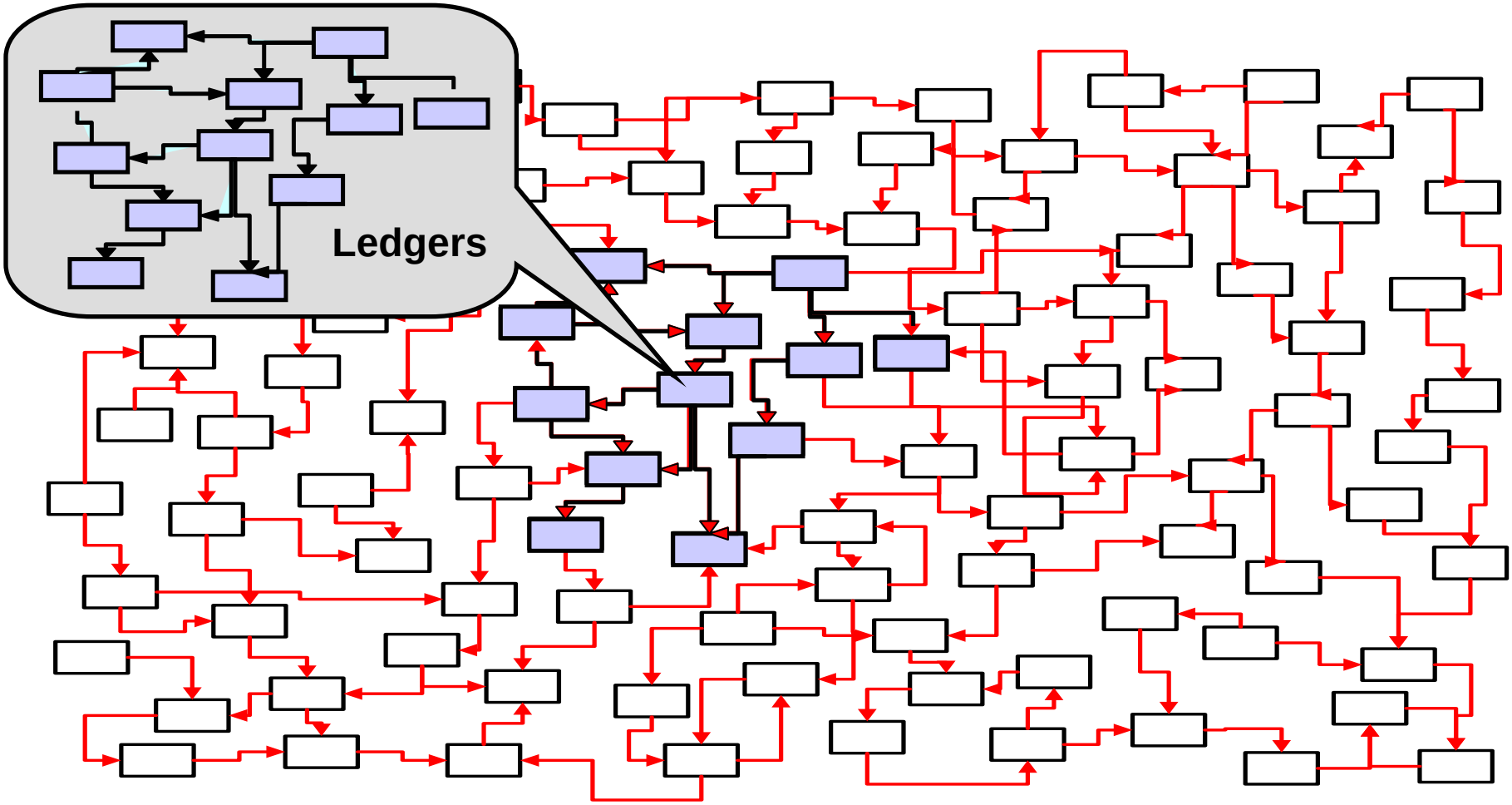
Define Storage Strategies



Set Migration Policies



Archiving a Complete Business Object



4. Store

- Determine format of archives
  - Archive file system
- Define hardware targets
  - Number of tiers
  - Types of devices
- Establish security parameters
  - Integration with existing framework
    - Database, application, network

5. Access

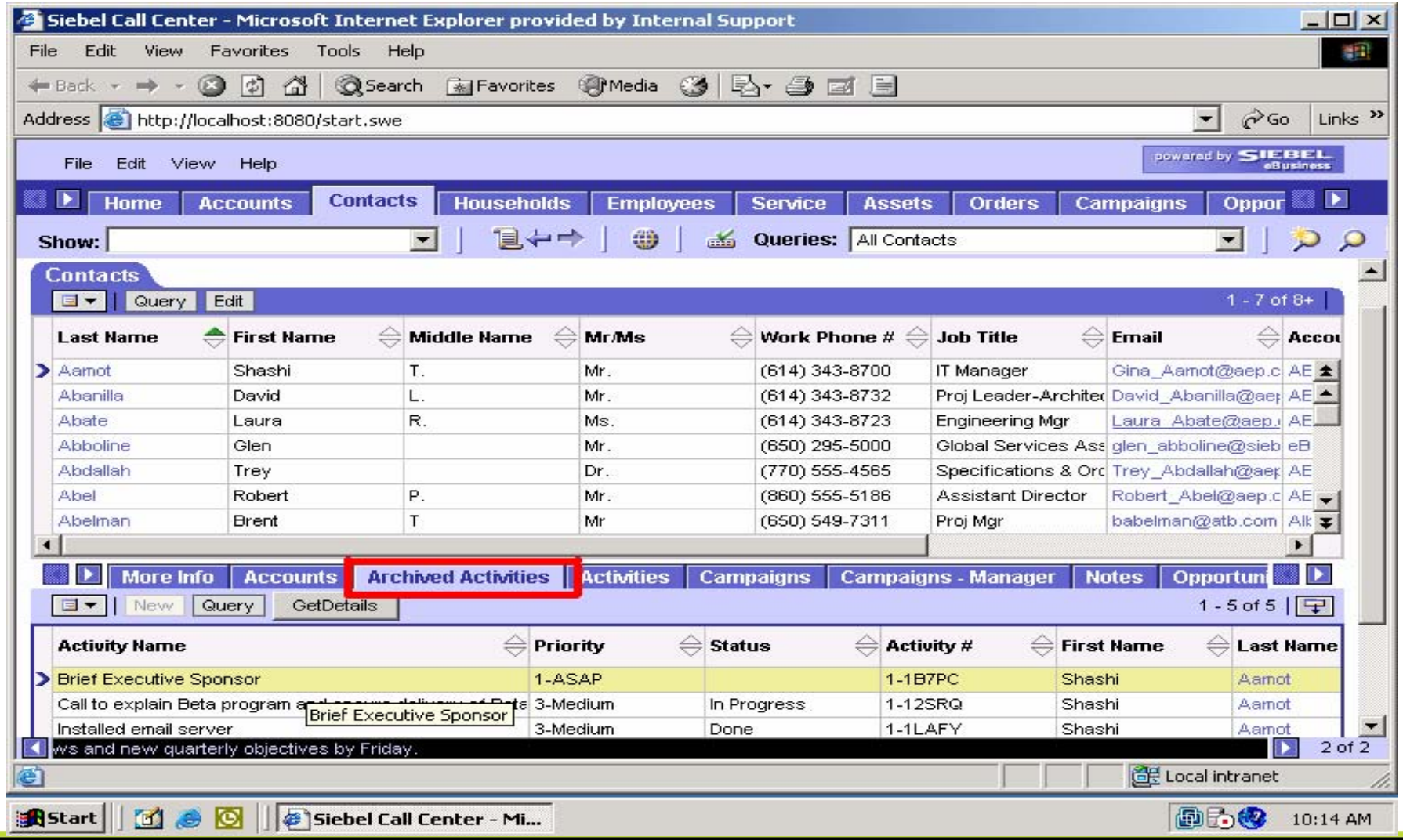
- Analyze use cases vs. cost of access
  - Goal: match SLA to value to cost
  - Application independent access
  - Native application access
- Communicate access terms & conditions
  - SLAs
  - Resource provisioning
  - Training on access paths

Access Example

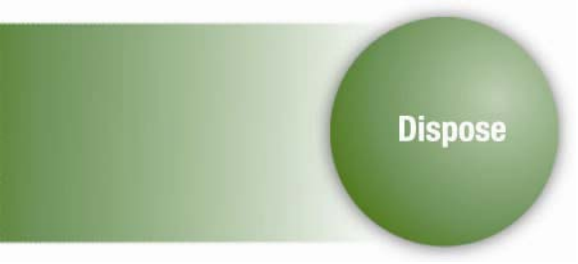
Application / Module / Business Object	Storage Tier Deployment	Archive Access Method	SLA
Call Center and Service V7.8 / Service Requests	Online Archive – Closed 2004 and earlier	Native	On Demand
	Nearline – Years 3 to 5; Offline – Years 6 to 10; Delete after Year 11	Application Independent	Standard reports on demand; Ad-hoc queries, 24-hour IT turnaround
Sales V7.8 / Opportunities	Online – Closed 2004 and earlier	Native	On Demand
	Offline – Years 3 to 8, Delete after Year 8	Application Independent	Ad-hoc queries, 24-hour IT turnaround
Marketing Automation V7.8 / Campaigns	Offline – Completed 2004 and earlier	Application Independent	Standard reports on demand; Ad-hoc queries, 24-hour IT turnaround

Note: Data in table represents actual scenario.

Integrated Within Siebel



6. Dispose



- Build cross-functional team
  - Business, legal, audit, IT
  - Business owns data, IT manages supporting infrastructure
- Determine data deletion policies
  - Signoff by stakeholders
  - Which records to delete, and when
- Ensure orderly disposal
  - Automated or manual delete
  - Audit trails

Success: Data Retention

About the Client:
Telecommunications, $13 Billion

- **Application:**
  - Siebel Application
- **Challenges:**
  - Need for data cleanse and purge records older than 7 years from Siebel databases
  - Preparing for corporate-wide data management effort to sustain goal of keeping only “what’s needed for the right amount of time”
  - Maintain operational efficiencies and reduce cost of maintenance
- **Solution:**
  - IBM® Optim™ Data Growth Solution for Siebel Customer Relationship Management
- **Client Value:**
  - Satisfied long-term data retention requirements by archiving for secure and readily accessible information
  - Ensured support for SOX and auditor compliance requirements by implementing archiving capabilities to locate and access historical financials data when needed for audit and discovery requests
  - Established a consistent methodology for managing and retaining historical data using Optim across applications, databases and hardware platforms

Success: Data Growth

About the Client:
Insurance, $12 Billion

BlueCross BlueShield of Illinois

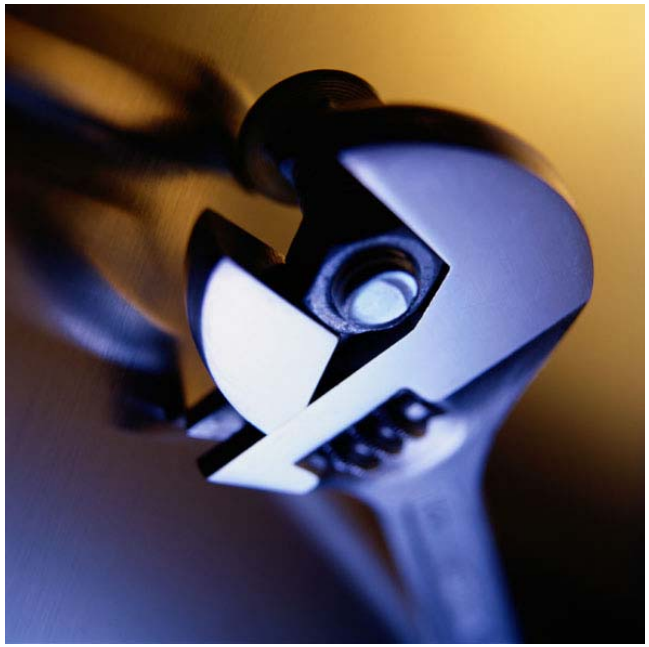
- **Application:**
  - Siebel Application
- **Challenges:**
  - Improving Siebel performance and availability by addressing data growth issues that expanded batch processing windows and degraded application response time with a negative impact on daily business operations.
  - Preparing to support an increase of 75 to 90 new Siebel users per week by taking steps to control application data growth without purchasing additional servers or disk capacity.

Solution:

- IBM® Optim™ Data Growth Solution for Siebel Customer Relationship Management

- **Client Value:**
  - Improved Siebel performance for 1000 business users and 2000 claims representatives by archiving 5 years of historical Siebel Activities and Service Requests from the 200 GB Siebel database environment.
  - Deferred costs associated with increasing disk capacity and server upgrades by implementing routine archiving to control data growth and support the expected increase to 4000 Siebel users.

Possible Alternatives to Archiving



- Tune or partition the database
- Add capacity
  - Processors, storage
- Back up the database
- Purge data

- Alleviate symptoms temporarily, but…
  - ***Inflate costs***
  - ***Do not address underlying data growth***

Summary of Advice

- Enterprise Data Management (EDM) Strategy
  - Not just a one time or “quick fix” tool
- Recognize that IT owns Infrastructure, but the Business owns the Data
  - Business Process of Archiving; 6 Basic Principles
- Meet Compliance Requirements
  - Respond quickly and accurately to audit requests
  - Reduce costs of discovery

Thank You!