

### The Client

With over \$48 billion in assets, our client is one of Canada's leading pension funds. As one of the largest institutional investors in Canada, they manage a diversified global portfolio of more than 2,800 stocks and bonds as well as real estate, infrastructure and private equity investments. The plan is managed by and for its members and employers, and today represents 906 employers, 372,000 members, retirees and survivors.

### The Challenge

The pension fund was responsible for managing perhaps their membership's most valuable asset, so the quality of their customer communication was of utmost importance. A key measure of their ability to deliver high quality service to their members and employers was the turnaround time required to process individual cases or member requests. In fact, these turnaround times were a benchmark measurement within the industry. With inbound and outbound member and employer communications occurring through a variety of channels, tracking this exchange of information had become onerous, time-consuming and in many cases inaccurate. The pension fund had some existing systems in place and a preferred IBM platform, but sought to introduce a more streamlined system to address this shortcoming in customer service. With much to consider and too many options available to them, they turned to VAULT Solutions for help.

### The Solution

VAULT was engaged to help design and develop the new communication tracking system. Working with the client's own in-house IT group, the new system was developed to track several forms of communication between the pension fund and members, retirees, employers, and other interested parties. A variety of communication media including phone calls, emails, letters, faxes, and physical meetings could now be tracked through one system. More importantly, records of these communication instances could now be flagged and added to a user's profile in a consistent manner which ultimately provided a more efficient tracking system.

Previously, information was stored in different systems and in some cases was not accessible by everyone. The new solution consolidated all external communications within one system allowing staff to easily find historical member and pensioner communication information when they are contacted by the same customer. Statistics reporting on call types, open times, etc. assisted in identifying issues in the call tracking process in an effort to increase responsiveness.

The solution was developed on IBM WebSphere Portal Server v6. The solution required user authentication and authorization of users to the system, but whereas the client wanted to leverage their user profile information from Microsoft Active Directory, they could not connect WebSphere Portal directly to Active Directory. VAULT recommended and integrated ADAM, Microsoft's lightweight directory server product, between IBM WebSphere Portal and the pension fund's Active Directory, providing a proxy to user accounts in Active Directory as well as providing an LDAP interface to Portal.

### The Benefits

The pension fund was able to take advantage of VAULT's expertise as an IBM Business Partner to navigate the many technology considerations and ultimately to implement a WebSphere Portal solution that best addressed their business and technical needs. This saved the pension fund time and money, which in turn allowed them to improve their customer service and of course, shorten their case processing times for members.

### Technologies Used

Development Tools: IBM Rational Application Developer version 7  
Database: Oracle 10g  
Web Application/Web Server: IBM WebSphere Portal v6  
LDAP: Microsoft Active Directory Application Mode (ADAM)  
Operating System: Windows Server 2003



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