

Time Machine[®] helps Folksam validate CRM automated campaign planning

Enable testing of date-sensitive offer on “set date” for validity

Quote

"Time Machine is paramount for us to test our Automated Campaign Planning, Processing & Billing in a timely fashion. All this needs to be ascertained today, to be possible to provide tomorrow. Thus the need for Time Machine and thus the extensive use of the product"

Karl-Konig Königsson,
Project Manager Test
Tools Specialist

About Folksam

Folksam is one of Sweden's largest financial companies offering insurance and pension investments. Almost one in two Swedes is insured with Folksam and Folksam is Sweden's biggest asset manager. Their vision is that people should feel secure in a sustainable world.

Challenge: Time Shift testing for insurance CRM application to assure accuracy and validity of future campaign offering

Folksam is developing and continuously deploying a CRM system where they present their sales people with a comprehensive picture of their customer's needs, and thus tailor and optimize the salesperson's interaction and experience with the customer. As a result, sales can connect with customers not only as part of a campaign, but also spontaneously whenever there are indications or triggers that the customer has experienced changes that have impact on current or future policies. For instance, could a move to a new home trigger a call from sales to check if the customer wants to make changes to the current home insurance and offer other services.

The CRM system will provide automated campaign planning and process support during customer interactions with continuous decision support for the salesperson.

A campaign is an offer that is planned in advance and that provides a certain rebate or a certain product with validity in time. Folksam has to be able to test that the offer is available during the dates set in the campaign and also see that, once you have settled on a certain policy or product, that is added and working as expected in the insurance system - the point being that the salesperson will help the customer to find possible changes or additions to their current policy and this has to be correctly entered into the system and billed properly.

The platform is Java based, deployed on AIX servers running IBM WebSphere with SQL Server backend (for local data. It interfaces with an array of systems) to connect to other insurance systems and databases within Folksam, as well as other systems responsible for email handling, and campaign organization.

The challenge for Folksam's team is to conduct future date testing today to validate its future campaign offering.

Time Machine Solution

After thorough research, the team identified Time Machine as the only solution for their project. It could handle all platforms used and in a consistent manner, capabilities that were necessary to provide the testing facilities needed for success.

Furthermore, the team leader considered Time Machine paramount for Folksam to be able to future test their automated campaign module, processing, and billing by setting up virtual clocks at any time.

About Solution-Soft

Solution-Soft is the leading provider of Intelligent Data Optimization (IDO) solutions, which address the urgent need for management of business-critical applications and data.

The flag-ship Time Machine product is a proven solution for enterprises to ensure mission critical applications are delivered on time and within budget. Solution-Soft works closely with consultant and strategic partners around the world in all industries to achieve clients' business objectives with ultimate ROI.

Founded in 1993, Solution-Soft is privately held and based in Silicon Valley, CA, USA.

Contact

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Time Machine enables the testing team to simulate time through the campaign lifecycle with ease. So in a couple hours, they can validate their entire 30 day campaign! Testers can time travel to any virtual date without the need to coordinate with administrators to shut down or restart applications, or change the system clock.

Time Machine is the only solution to do time travel in Windows Active Directory secure environment. Time Machine boosts testers' productivity tremendously.

With Time Machine's multiple virtual clocks, one test environment can become multiple test environments. As a result, testers can test different campaigns with different time periods concurrently in the same environment. This saves hardware, software and people costs.

According to Karl-Konig Königsson, Folksam's IT Project Manager,

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