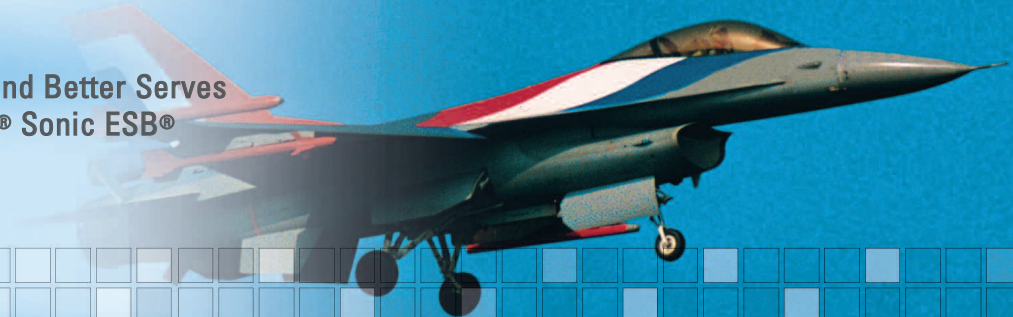


A Unified Front: First Command Better Serves its Customers with Progress® Sonic ESB®



CHALLENGE

Give customers one-stop shopping—a single portal where they could access their entire financial plan, online banking, and investment accounts.

SOLUTION

Deployed Progress® Sonic ESB® to integrate financial planning applications and launch new Web services, such as personalized financial portals for customers.

WHY PROGRESS® SOFTWARE

Progress operates like a partner, supports open standards, and provides an enterprise SOA that integrates all of the organization's applications across the entire architecture.

BENEFIT

Has achieved significant savings in the time required to develop and implement new applications while lowering the total cost of ownership; can now better serve tech-savvy customers and offer new financial services to stay competitive.

CASE STUDY

First Command Financial Planning provides financial services to some of the hardest-working clientele in the country: the military. To connect to customers—no matter where they are stationed—the company is deploying a service-oriented architecture (SOA) to support its Web services.

BUILDING A FINANCIAL BASE FOR MILITARY MEMBERS

First Command Financial Planning is the legacy of Air Force Lieutenant Colonel Carroll Payne. Payne was deeply affected by a fatal B-36 bomber crash in 1951 that left the widows and children of five crewmen with insurmountable financial problems. As a result, Payne founded a worldwide organization to provide financial planning to members of the uniformed services. Today, First Command serves more than 300,000 military families.

Over the past decade, many First Command customers have become active Internet users—especially when stationed far away from home—and have come to expect the convenience of secure, easy-to-use online services from their financial services provider.

First Command wanted to create a Web portal to give military members secure access to all of their financial services from banking to brokerage accounts. In addition, the company wanted to give its agents more online tools to provide higher-quality service for customers.

“We wanted to give customers one-stop shopping—a single portal where they could access their entire financial plan, online banking, and investment accounts, including accounts held with other companies,” says John Quinones, CIO for First Command. “Our goal is to enable customers to take more ownership of their financial well-being.”

To carry out its mission, First Command needed to build an enterprise SOA that would allow the integration and central management of existing applications, and the efficient addition of new standards-based services going forward. To unite its architecture, First Command found an ally in Progress Software and its enterprise service bus (ESB), Progress Sonic ESB.



INTEGRATING AND EXPANDING WEB SERVICES

In the past, each First Command proprietary application was developed in a “vacuum,” Quinones says, making these applications difficult to maintain, modify, and expand. The applications also had custom interfaces that were not integrated. So when a change was made to an account file in a database, such as a customer’s new mailing address, the modification was not automatically reflected in all systems.

First Command needed an infrastructure that would allow it to integrate eight major business-critical applications along with many smaller disparate applications and services—ranging from banking to financial planning—with the flexibility to change and add new services as they became available.

“We needed an open-standards architecture that would allow us to develop applications that could be plug-and-play and could talk to each other in the same language,” Quinones says. “I didn’t want to have to reengineer or completely redevelop an application every time I wanted to make a major change or expand our services. We needed the ability to develop applications more quickly, support them easily on our own, and grow with an economy of scale so we could spend more of our dollars on providing services to our customers as opposed to supporting applications and adding IT staff.”

First Command built an architecture that connected its two main platforms: a BEA application server that hosts the customer Web services portal and an IBM eServer iSeries® platform that supports back-office operations. After a rigorous proof-of-concept evaluation with several vendors, Sonic ESB was selected as the integration layer to ensure reliable data exchange between these platforms and their supported applications.

“When we work with a vendor, that vendor becomes a trusted partner. We sought out Progress because it operates like a partner and supports open standards. It doesn’t matter what environment you’re connecting to, Sonic ESB doesn’t require a custom interface,” Quinones says. “With Sonic ESB, we have an enterprise SOA that integrates all of our applications across the architecture.”

ADDING UP THE SAVINGS

Today, First Command has an infrastructure that allows the company to be more nimble, better serve customers, and better compete with other financial services providers. Sonic ESB helps First Command more quickly launch new applications and business processes.

Applications also are seamlessly integrated, reducing redundant data entry and improving customer service. For example, a critical financial calculation engine is integrated into all applications. Now, when customers go online to calculate the interest their retirement accounts are expected to earn over time, the figure will be the same as if customers called an agent on the phone. “Financial projections are now accurate across all the services and documentation our customers can access,” Quinones says.

“With Sonic ESB, we have an enterprise SOA that integrates all of our applications across the architecture.”

— John Quinones
CIO

Customers will soon be able to review their financial plans online or get advice from agents via their portal, and they will be able to access their First Command banking accounts online. In the future, customers also will be able to access accounts they have with other firms through their First Command financial portal. "We don't want customers to have to go anywhere else to manage their financial planning," Quinones says.

One other added benefit of building an ESB-based infrastructure is that First Command now has a better understanding of all its processes, so it can continually improve services, operational efficiency, and security. For instance, First Command plans to build a self-service human resources portal for employees to improve access to benefits information, which will save time and money.

The major benchmark of success, however, is reflected on the company's balance sheet. First Command has already reaped a positive return on investment on its enterprise SOA by using the Sonic ESB. And Quinones estimates that his 120-person IT staff will no longer require the support of additional contractors for application development or system maintenance.

"We've had no hiccups at all with Progress Software," Quinones says. "Not having to dedicate a lot of resources to our new architecture has been a tremendous savings for us. We've been able to spend more time training developers and getting applications online rather than worrying about troubleshooting bugs—because we just don't find any in the ESB."

ABOUT PROGRESS SOFTWARE

Progress Software Corporation (Nasdaq: PRGS) provides application infrastructure software for the development, deployment, integration and management of business applications. Our goal is to maximize the benefits of information technology while minimizing its complexity and total cost of ownership.

www.progress.com

PROGRESS
SOFTWARE

Worldwide Headquarters

Progress Software Corporation, 14 Oak Park, Bedford, MA 01730 USA
Tel: +1 781 280-4000 Fax: +1 781 280-4095
On the Web at: www.progress.com

For regional international office locations and contact information, please refer to the Web page below:

<http://www.progress.com/worldwide>

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