Enterprise CRM
Customer Onboarding

Some organizations with multiple CRM and ERP systems have responded to the CDI challenge by implementing rigid manual process controls for customer onboarding. This is a reaction to the problems of the "wild west" mode of operation, where everyone creates records in the various systems, and then they have to figure out how these records sync up. In order to avoid this outcome, these organizations rely on a manual email/forms-based process to gather needed information, and put a "gatekeeper" in place to check everybody else's work and key in the data.

For example, the organization may have different regional CRM systems or instances in use in different business units. When they start selling to a new customer in either business unit, they want to make sure that they create the customer record in both systems, as well as in their ERP system, in the same way, to ensure they are starting with clean data and a consistent customer identity across the board. As a result, they implement an off-line process, such as this one:

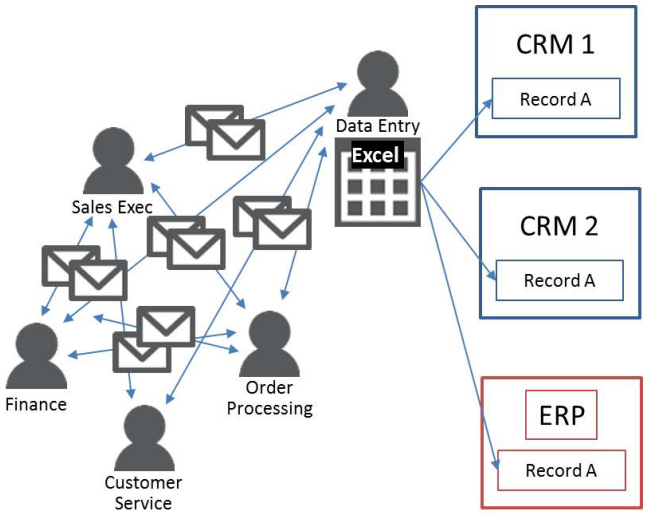
Manual Onboarding Process

1. Data entry person (DEP) is told that Customer A, a new customer, is ready to be entered into the enterprise CRM and ERP systems; DEP emails spread- sheets to Sales, Finance, Customer Service and Order Processing, asking them to send relevant information on Customer A.

2. DEP receives replies, keys information into Excel spreadsheet, realizes that needed information is still missing from some departments, and has to chase it down. Meanwhile, the Department Managers have no idea of where the customer is in the onboarding process, and cannot set appropriate ordering, shipping and/or billing expectations with the customer.

3. DEP finally receives all necessary information, and manually enters it into CRM 1, CRM 2, and the ERP system, being careful to ensure that the information from the spreadsheet is appropriately and correctly entered into each, so that Record A is the same in all systems. Only now can order processing begin— and that is the true definition of customer "onboarding".

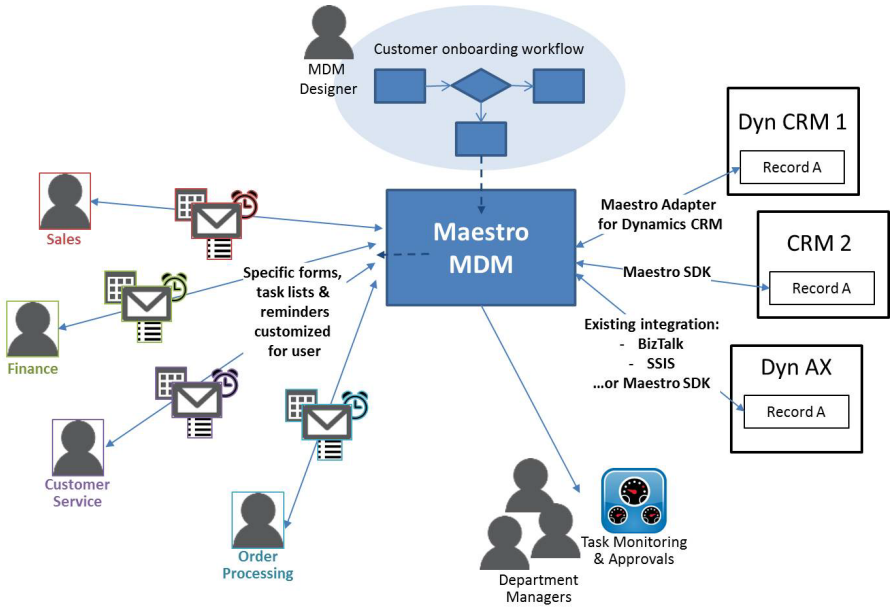
It is assumed this rigid approach will ensure that the way data is recorded and entered into the different systems will be the same each time. The truth is, this type of manual onboarding process can be chaotic, hard to track, and prone to error. And, having taken great pains to get their customer data clean, organizations that take this approach find themselves suffering from the fallout – it takes forever to get a new customer into the system, which means a delay in booking orders. All they've done is to exchange a dirty data/matching problem for a red tape problem.



Workflow-based Customer Onboarding

With a Profisee Platform implementation, this ineffective manual process can be exchanged for an automated, workflow-oriented approach, with distributed responsibilities, where the right people with the right security and access are prompted to enter the right pieces of information in a timely manner. This workflow-based process not only eliminates information-gathering bottlenecks, it gives managers the ability to track where things are in the process, know who's doing what and who's taking too long, and escalate as needed.

Based on the defined onboarding work- flow, the Profisee Platform sends notifications to users with very specific instructions, forms, task lists, and reminders, requesting information pertinent to their work area. Profisee's workflow-based process can also provide department managers with a dashboard view so they can see how many items they have in process, where everything is in the process, and who is late. When the new customer data is ready, Profisee's Connectors publish the completed data to the various CRM, ERP or other kinds of systems that work with customer-related data. This approach not only assures the use of clean, matched data, ensuring a consistent customer view across enterprise systems, it also streamlines the process, so that on- boarding can be accomplished quickly and efficiently, and profitable customer interactions can proceed in a timely manner.



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Profisee was founded following the acquisition of Stratature by Microsoft in 2007. The management team at Profisee built the MDM product now offered by Microsoft as Microsoft MDS. Profisee is dedicated to delivering enterprise-grade MDM capabilities to the Microsoft MDS platform through its Platform.

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