Profisee Group, Inc.

Enterprise CRM: Consistent, Coordinated, Current

Maximizing customer potential across the enterprise

Customer relationship management (CRM) software helps organize and automate customer-focused business processes that foster customer loyalty. This requires a single "360° view" of the customer that crosses all phases of the customer relationship – in other words, a robust customer data integration (CDI) strategy. There are specific challenges in implementing enterprise CRM in support of CDI, however, from the volatility of customer data; to organizational silos of customer knowledge residing in function-specific systems; to the need for CRM systems to capture early customer information, which can lead to incomplete and duplicate customer records down the road. Enterprise growth can require the assimilation and integration of customer data in a variety of systems. All of these, along with the CRM system, must draw from the same "master" customer record in order to achieve the ultimate goals of the CDI strategy. This can best be accomplished by integrating customer-related information into a master data management (MDM) solution.

Customers in today's world have unprecedented access to products and services, in terms of competitive options, buying channels, market knowledge and product information. Today's enterprises find themselves competing for the attention and spending power of more informed, aware and discerning consumers than ever before. This requires smarter marketing, better value and more appealing products and services. Yet even with all these bases covered, it takes more win in today's business environment – it takes effective customer relationship management.

As technology has provided the world with ever more channels and platforms for data access and customer interactions, businesses have been forced to evolve their processes accordingly, to manage their customer relationships more effectively. Customer relationship management (CRM) software helps increase profitability and reduce customer acquisition and retention costs, by organizing and automating customer-focused business processes that foster customer loyalty.

In this paper, we will delve into both the promise and challenges of CRM. We will look at the benefits of CRM software for delivering a full lifecycle view of your customers, and why that is so important in improving time-to-value and lowering costs. We will also discuss potential architecture pitfalls, some of which may already exist in your organization, look at events that could derail your future CRM effectiveness, and introduce the potential of master data management to gain the greatest value from CRM systems.

The benefits of a comprehensive Customer Data Integration (CDI) plan

Whatever the size of your organization, some tools are already in use to manage customer data. This can range from the contact information in a sales rep's phone to fully integrated CRM and ERP systems in large organizations. The key to increasing customer satisfaction, identifying highest value opportunities – and lowering the cost of pursuing them – is to provide an accurate and consistent view of the customer across the entire organization. In order to do this, you need a comprehensive plan, and supporting infrastructure, for integrating customer data. A robust customer data integration (CDI) strategy provides an important flexible framework that allows an organization to adapt, while still maintaining central oversight and control of customer data in CRM systems and other systems that use customer data at different points in the customer interaction lifecycle.

360° View of Customers

The greatest benefit of CRM is to ensure that you and your customers gain the most value from your relationship. This begins with support for consistent customer interactions across your company. No matter the scale of your organization, each buyer wants to feel that your company has the capacity to recognize them in each interaction with you, and behave accordingly. Nothing is more frustrating than to be approached as a prospect by a marketing or presales initiative that doesn't seem to recognize you as an established customer – unless it is to encounter a need for customer service, and have the service organization be unable to locate your purchase records; or to receive an invoice that doesn't recognize the discount or payment terms you were extended by the sales team. They want to be recognized as the valued and valuable customer they are, from every angle of your business, in every interaction, and to accomplish this, you need a single "360° view" of your customer that crosses all phases of the customer relationship, from marketing to sales, ordering to invoicing, implementation to support. This is what CRM systems are designed to deliver.

Rapid Time-to-Value

Your relationship with your customer begins before they walk through the door, before they receive their first sales call, before they place their first order. It begins with the company whose ad pops up in their browser, whose email they receive, whose marketing campaigns reach them through a variety of channels. CRM, enabled with robust technology, should empower you to target those campaigns so that they are most likely to reach a receptive audience. This is the first stage of developing profitable customer relationships, and

Direct, codeless systems integration

The Profisee Platform leverages the Master Data Services (MDS) base platform delivered by Microsoft as part of SQL Server, to provide a seamless enterprise-level MDM platform. Profisee then delivers de-duplicated data back to one or more CRM instances, and provides the tie between other enterprise systems that use customer data.

Profisee Integrator for Dynamics CRM gives users the ability to integrate their Dynamics CRM instances directly into a Profisee MDM Server for cleaning, de-duplicating and mastering, without the need for a data bus.* And, since the integration can be performed without coding, companies eliminate the need for lengthy IT projects or expensive consulting services. Systems integrators make a nice living coding integration projects, but coding leads to risks – risks in correct interpretation of requirements, risks of incorrect coding, risks in testing. A codeless integration, on the other hand, provides the same benefits of Dynamics CRM: The user – who is most familiar with functional requirements – takes control and can easily change field mappings without the need for any coding whatsoever.

In addition to lowering risk and improving system acceptance and results, this "codeless" integration reduces time-to-production and significantly lowers up-front implementation costs. As a result, companies realize faster time-to-value and lower maintenance overhead.

*If a company already has a data bus, the Profisee Platform can leverage it, but for most companies, direct codeless integration is key.

to make it successful, you must have the ability to deal with target markets or market segments as groups of individuals. Each of these individuals develops a relationship with your company when you "reach" them with a product, service or solution pitch, and they respond to your call for action – click for more information, schedule a demo today, download our free whitepaper. The fact that your offer resonated with them indicates that you already knew something about them. Their response confirms that, and the "customer" relationship is established. Good CRM practices and technologies will ensure that the information about this initial engagement is fully leveraged through all future initiatives and interactions.

CRM enables you to "recognize" your customers – and engage them through positive interactions – from the very beginning of the marketing/sales process. This speeds the time-to-value of each customer relationship, ensuring that:

- Marketing is well targeted and effectively moves prospects into the sales funnel as appropriate;
- The sales organization has all the information it needs to follow up on customer responses and inquiries rapidly and efficiently;
- Management can quickly recognize an ineffective or stalled sales process and take appropriate action;
- Implementation, training and customer service personnel have the information they need to ensure customer satisfaction;
- Order processing and invoicing are accurate and timely.

In this way, not only are organizations able to move the customer through the value cycle quickly, they are better able to evaluate customer profitability profiles, and focus marketing and sales efforts on highest-value prospects.

Total Cost of Ownership

It is not possible to have a meaningful discussion of time-to-value without looking at the cost component of the enabling technology. In this regard, Microsoft Dynamics CRM offers an optimal solution, delivering strong functionality with advanced technology options, a shorter implementation timeframe and a lower cost of operation than other CRM software available on the market.

Dynamics CRM offers cloud-based configurations integrated with on-premise options. These flexible implementations combine advanced, state-of-the-art social networking tie-ins with a mature, productized approach to CRM. The technology profile of Dynamics CRM, along with a product cost that is the lowest in the industry, enables organizations to realize the 360° customer view that drives the fastest time-to-value scenarios described above.

Making the right CRM software decision is key to gaining control of the customer information needed to drive marketing, boost sales, and provide support. However, implementation considerations and corporate dynamics are major determiners of whether organizations receive full benefit from their CRM software. Organizations need to ensure that they are armed with the technology to implement robust CDI strategies in a rapidly changing sales and marketing environment. For example, how will you maintain a consistent, single view of a customer across disparate systems for support and marketing? How will you track customer interactions and status across diverse systems in different regions and business units?

Existing impediments to effective CRM

As important as it is to manage it well, customer information is the most volatile data within an organization. New customers and prospects are identified every day, while large numbers of prior customers will move, go out of business, or otherwise change status. These customer changes may be recognized and recorded by any number of different functions or business units within the organization, but they need to be reflected in the CRM system to preserve the single customer view.

In organizations where a single group holds knowledge about the customer relationship, the rest of the organization may be in the dark when it comes to the current status of a given customer relationship. For example, a software sales team with direct access to the customer may use a modest homegrown database to track sales opportunities within the customer organization. Unfortunately, when the sales team is in the process of renewing a customer contract, without access to the sales system, the rest of the organization is unaware of the conversation. The support team may keep track of customer issues within a bug management software system that allows developers and support engineers to track known issues and provide customers with updates and workarounds. That information might be key to the successful renewal of the customer's maintenance contract, but without access to the bug management system, sales has no knowledge of it.

In an integrated system, support and development managers would be aware of sensitive situations around specific customer renewal efforts, and the sales team would be aware of – and able to plan for – any support-related impediments to their efforts. While it is unreasonable to expect that either the sales or support system would take over the full role of the other, an intermediate system containing a superset of all information from both sales and support would allow for the aggregation of this information.

CRM software is designed for exactly such customer information aggregation, from acquisition of the initial sales lead, through the prospect qualification and sales process, and beyond, through order processing, invoicing and support. But this information lifecycle presents some challenges related to data management. A good sales lead may very typically start as nothing but a name – possibly even an incomplete name, such as Mr. Jones; E. Jones; Eric J. – and a phone number. The CRM system needs to be able to accommodate the initiation of a customer record on information this lean, to be sure it gets captured as early in the process as possible. It can then be fleshed out as the customer relationship develops. But this means that the CRM system must navigate the tricky balance between capturing information even when incomplete, while still maintaining requirements and thresholds that result in complete, unique customer records in the system. In other words, CRM systems must err on the side of caution when requiring fields and enforcing duplicate detection, even though this can lead to incomplete and duplicate customer records in the system.

New concerns in growing companies

While customer management is important in any company, companies managing rapid growth face additional challenges on the customer front. Whether company growth is organic or achieved through acquisition, a quickly changing market and competitive landscape can raise significant concerns.

Initial CRM projects often – wisely – tackle a single aspect of the business; that is, a single product line, a single sales territory, a single business unit. These single-facet implementations can be quite complex in and of themselves, taking full advantage of the whole-lifecycle customer information management features of a robust CRM system. As the value of CRM is recognized and embraced throughout an organization, companies frequently implement additional CRM instances to tackle other aspects of the business. However, these CRM silos can be difficult to integrate down the road, when territories are realigned or product lines combined, for example, or in cases of company growth through mergers and acquisitions.

When an organization acquires another organization, duplicated functions must be combined to optimize the new merged organization. No area of duplication is more complex or harder to transition than sales. Not only will each organization have products that may or may not compete with each other, each will contain a fully functioning sales team with systems and processes in place to support their activities – including systems that track their respective customer data. Depending on the nature of the sales team's transition, keeping all of the existing systems in place may be optimal, but integrating them – at least at the level of customer data – is required for successful enterprise CRM. Unfortunately, integrating these systems can present a significant technical challenge

for which few organizations are prepared. In rapidly growing companies, multiple acquisitions may occur each year, making it necessary to put in place repeatable processes and enabling technologies for rapidly integrating the merged companies' systems. The resulting system landscape may include multiple instances of CRM systems (possibly all of one type; more often from different system vendors).

The Case for Master Data Management in Enterprise CRM

Even in cases where an organization is operating a single CRM system, there are other enterprise systems that consume and contribute to customer information, or drive customer interactions. All of these enterprise systems, along with the CRM system, must draw from the same "master" customer record in order to maintain consistent customer service levels across the organization and maximize the benefit of customer-related processes at every level – in other words, to achieve the ultimate goals of a CRM-enabled CDI strategy. This can best be accomplished by integrating customer-related information into a master data management (MDM) solution.

MDM addresses business challenges around customer information management that CRM systems are not designed to solve, from making sure that a new CRM system is populated with customer data that you know is complete, accurate and clean, to maintaining that data quality across functions, systems and business units. MDM enables organizations to produce and maintain that single, reliable, 360° view of the customer, and make it readily available within CRM systems, and between CRM and other enterprise systems. MDM provides a method to easily integrate customer data with other relevant data, e.g., products, contracts, pricing, 3rd-party data, and effectively integrate and de-duplicate customer data during mergers/acquisitions.

In the next two papers in this series, we discuss how the Profisee Platform works with Miscrosoft Dynamics CRM to help you maximize the value of your customer data across the enterprise, and how a Profisee MDM solution can help enterprises coordinate diverse CRM implementations across geographies and business units.