

Enterprise CRM Coordination through the Profisee Platform



Profisee Integrator for Dynamics CRM enables organizations with Dynamics CRM to use the Profisee Platform as a master data management (MDM) hub to implement customer data integration (CDI) across a growing or complex organization. One CDI hurdle for global organizations is the management of customers across geographies with different regulatory policies and local customs, and different ERP systems, which may drive the selection of different CRM solutions. Another challenge is managing a CDI strategy across disparate business units that may have completely different buying profiles and business decision-makers, and therefore different CRM data, for the same corporate customer. These challenges can make it difficult to implement a fully homogeneous CRM solution. However, organizations can gain the benefits of a homogeneous implementation with the practical advantages of a heterogeneous solution – making multiple CRM instances operate as a global customer data management system – through an MDM implementation.



As organizations grow in size and complexity, significant issues can arise that undermine the benefits of CRM systems. Some of these issues, such as one-off departmental solutions, may already be creating drag on your organizational effectiveness. Other issues may be related to current or future acquisitions and the necessary integration of disparate systems. Internal requirements may also necessitate different systems being used by various business units within the organization. A robust customer data integration (CDI) strategy provides an important flexible framework that allows an organization to adapt, while still maintaining central oversight and, when needed, control of customer data in CRM systems and any other systems that require reliable customer data to perform correctly.

At its core, CDI relies on a single view of the customer – a customer identity – that is persistent across enterprise systems, including various instances of CRM. As discussed in the previous paper in this series, the Profisee Dynamics CRM Connector enables organizations to use the Profisee Platform as a hub to integrate customer data from Dynamics CRM systems with customer data residing in other systems across the enterprise. The Profisee Platform enables diverse enterprise systems to draw from the same “master” customer record, by linking customer-related master entities, and all of their defining attributes, to create and maintain the single customer view required for a successful CDI strategy – one that can address the challenges of expanding a single-instance or localized CRM initiative to a global customer data solution.

In this paper, we will look at the specific challenges associated with managing CRM across a growing or complex organization, from the difficulties of managing widespread geographical implementations, to the complications of managing data across business units. Then we will look at how you can gain the benefits of a homogeneous CRM implementation with the practical advantages of a heterogeneous solution, making multiple CRM instances operate as a global customer data management system, through a master data implementation.

Managing data across geographies

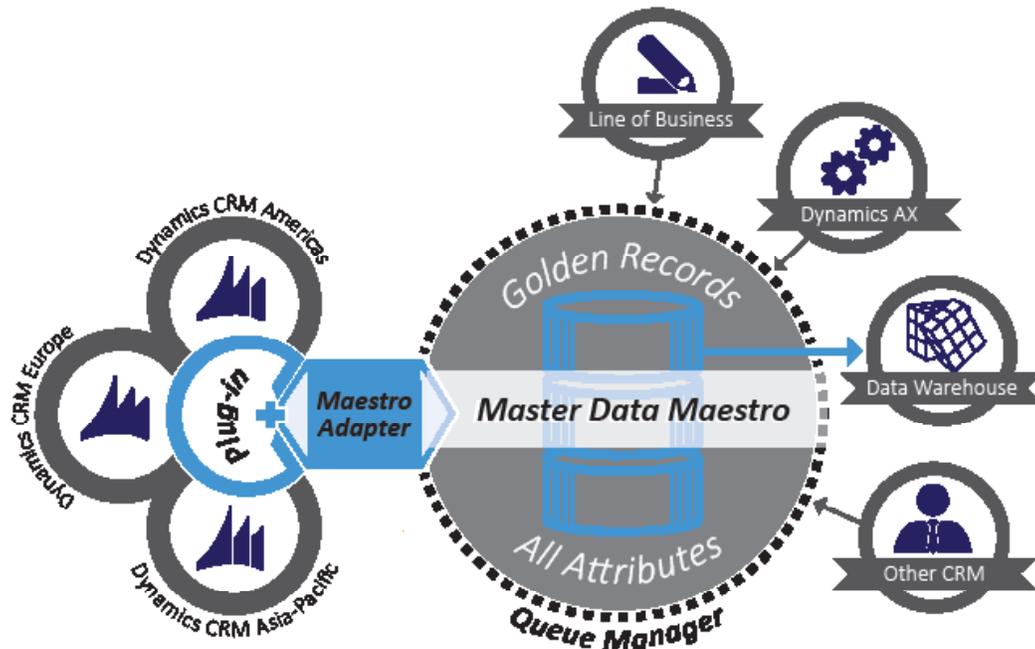
A significant CDI hurdle for global organizations is the management of customers across geographies. CRM solutions such as Dynamics CRM can provide a powerful and highly sophisticated platform for organizing, automating and streamlining the sales and marketing business processes that nurture customer satisfaction and loyalty. By its nature, while it may seem like it would be ideal, for purposes of data consistency and central IT control, to have everyone in the enterprise operating from a single CRM instance, for larger, more geographically dispersed companies, it isn't likely to be feasible.

Business units operating in different geographies are most often driven by discrete ERP systems and operations. The CRM system of choice in these different locations often derives from this, with heavy ERP customization and subsequent integration driving the technology and versions of CRM selected for use in each geographically disparate operation.

Further, it may not even be desirable to consolidate on a single instance of CRM, from the perspective of maximizing customer intelligence. Each country can have very different regulatory policies and local customs that can affect how customer relationships are managed. Local knowledge of the business culture can be most effectively applied by managing country-specific customer relationships in separate CRM systems for each region or country.

The ideal would be to maintain local processes, preserving inherent systems and customer knowledge, then leverage the value of that knowledge enterprise-wide by unifying customer identities across the globe, through a master data management implementation. With the establishment of a globally consistent customer identity, the customer's diverse regional information can be linked to a master customer record, where it becomes easily accessible across your organization, without force-fitting everyone to a single enterprise CRM implementation. This means that:

- Local acceptance and use of existing CRM systems can be preserved, and existing customer data readily integrated and leveraged.
- Knowledge of regional initiatives within the customer organization can more easily be shared with sales and service teams in other areas, to help drive customer value.
- The size and potential value of a given customer can be more fully recognized in a customer view that includes information from beyond a single region.
- Remote regions gain greater access to information about higher-level customer executives who are in other regions, but who may be key decision makers on larger projects.



A Profisee MDM solution will enable you to preserve geographically unique CRM requirements and granularity as appropriate, giving you options to solve the integration challenges of managing data across geographies with backend processing. This means that users in any of your company's locations worldwide can use the operational systems and applications they are comfortable with, and those that work in their respective technical environments, and still be fully integrated into an enterprise-wide CDI strategy.

Managing customer data across business units

The various business units that typically make up large corporations may sell many different items or services to vastly different types of buyers, and may use a variety of technologies to manage their sales.

In addition to the potential for different technology needs and profiles in various business units of your company, the information tracked and required on a given customer can vary widely between business units. The buying profile and business decision-maker addressed by each sales team can be very different, depending on what the specific business unit is selling. For an airline company that is a customer of GE, for example, it's probably going to be an engineer or equipment purchasing department that is buying an engine for a Boeing 777 from GE Aviation, whereas the director of maintenance at

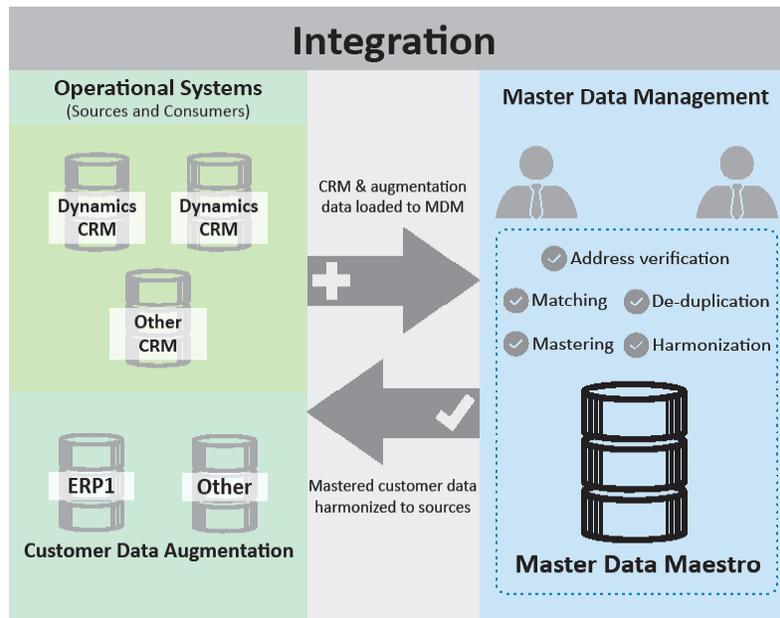
the same airline may be the buyer for Line Maintenance courses from GE Customer Training Services. While it's very valuable to understand the economic benefit created by this customer across all business units, even in a more homogeneous technology environment, being able to reconcile these different views of the customer to a single, enterprise-wide customer identity creates data management challenges.

A Profisee MDM solution limits the technological impact of complex business decisions inherent in managing disparate business units across the enterprise, giving you the opportunity to appropriately phase-in any move to a more consolidated technology profile, and enabling you to effectively integrate technology outliers in the meantime. In addition, it gives you the opportunity to combine customer data from mergers and acquisitions, ensuring that the resulting superset of customer data is complete, consistent, accurate and de-duplicated, and meets the needs of all customer-facing operations across the organization.

Homogeneous vs. heterogeneous solutions

The value of CRM is to coordinate and inform sales and marketing-related processes, providing a standardized approach to customer relationships and consolidated customer data. Clearly, the easiest way to manage customer data and implement consistent processes across your organization would be to integrate multiple instances of the same software, such as Dynamics CRM, in every business unit of your company, everywhere you do business. In this way, even though each CRM instance may be customized for the specific region or business unit, the most important attributes of your customer data could be managed with similar data types and lengths, greatly streamlining your CDI strategy and ensuring data consistency. If you are in a position to do so, integrating your multiple CRM instances using the Profisee Connector for Dynamics CRM will help support sales and marketing interactions that fully leverage all of the most current intelligence available about the customer to improve outcomes, and the Profisee Platform's ability to share that master customer view with non-CRM systems across the organization will result in better interactions over the full lifecycle of the customer relationship.

Unfortunately, as we've seen, the specific challenges inherent in managing customer data across geographies and business units can make it difficult – even inadvisable – to implement a fully homogeneous CRM solution right from the start. The world in which you grow your business, both organically and through mergers and acquisitions, includes a wide variety of systems, some of which are specific CRM applications, others which are tangential, using customer data to interact with customers beyond sales and



marketing. All of these enterprise systems 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. Yet many of these are deeply invested proprietary or custom-built systems, or reside in regions where, due to budgetary or technology constraints, can’t easily be replaced with homogeneous system implementations.

By incorporating Profisee MDM into your CRM solution, you can effectively achieve many of the benefits of a homogeneous implementation along with the advantages of a more flexible heterogeneous approach. The use of the Profisee Platform will speed initial implementations and improve ongoing maintenance and integration by assuring that customer data – whether from Dynamics CRM or other CRM instances, enterprise systems, or third party sources – is complete, consistent, accurate, and de-duplicated across business units and geographies. The Profisee Platform’s data harmonization ensures that changes in source systems are appropriately applied to the master customer record in the CRM system, and guides the process of pushing updated CRM data back out to source system records, providing complete operational MDM capability. This ensures you realize the benefits of a homogeneous implementation, and yet eliminates a typical drawback of heterogeneous solutions that rely on a point-to-point model, which requires you to build an adapter for each CRM system to talk to the next and the next, and so on. By establishing a hub-and-spoke model using the Profisee Platform, all data flows into the hub, and then goes out to all the sites, providing an efficient network effect. With this network effect, not only do you benefit from Profisee’s data cleansing and attribute validation, but you only have to integrate each system with the Profisee Platform, not with all other system nodes. And, having the custom Connector handling integration

with all Dynamics CRM instances makes it that much simpler.

Summary

A robust CDI strategy provides an important flexible framework to ensure that your organization receives full benefit from your CRM systems. But as organizations grow, managing customer data across geographically dispersed locations and/or disparate business units can make it challenging to create and maintain the single customer view required for a successful CDI strategy. The goal of implementing a homogeneous CRM implementation would be to minimize the integration challenges of an enterprise-wide solution, but the specific challenges inherent in managing customer data across geographies and business units can make that difficult. By integrating Profisee MDM into your CRM solution, you can achieve the benefits of a homogeneous implementation, with a practical, manageable, hub-based solution that integrates the diverse systems and inherent customer knowledge of the entire enterprise, making it practical to establish and maintain a single authoritative view of the customer, and maximizing the value of customer interactions across the organization.