Customer Relationship Management (CRM)

Dr A. Albadvi

Asst. Prof. Of IT

Tarbiat Modarres University

Information Technology Engineering Dept.

Affiliate of Sharif University of Technology

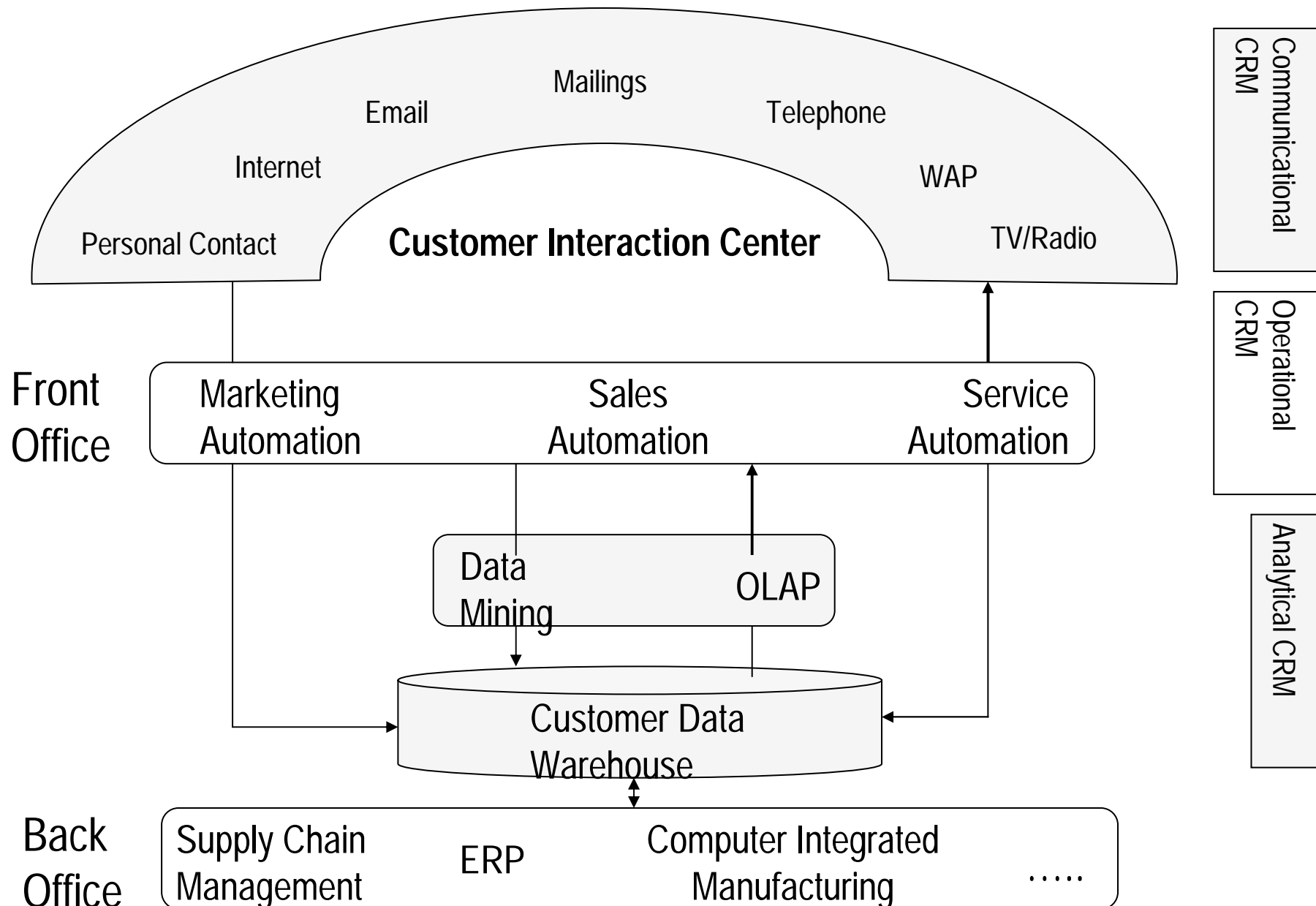School of Management & Economics

Sept. 2003

WWW.albadvi.net

Session#3: Agenda

- CRM Solution Categories

- CRM Solution Leaders & CRM Vendors

- CRM Structures

- CRM Solution Functionalities

- CRM Solution for Medium to Large Enterprise

- CRM Solution for Small to Medium-size Enterprise

CRM Solution Categories

- **Operational CRM**
  - Customer-facing applications that integrate the front, back and mobile offices, including sales-force automation, enterprise marketing automation, and customer service and support

- **Analytical CRM**
  - Applications that analyze customer data generated by operational tools for the purpose of business performance management.

- **Collaborative/communicational CRM**
  - Collaborative services such as personalized publishing, e-mail, communities, conferencing, and web-enabled customer interaction centers that facilitate interactions between customers and businesses. Collaborative CRM is used to establish the lifetime value of customers beyond the transaction by creating a partnering relationship

CRM Solution Structure

- Mailings
- Email
- Telephone
- Internet
- WAP
- Personal Contact
- TV/Radio

Customer Interaction Center

Communicational CRM

Operational CRM

Analytical CRM

Front Office

Marketing Automation | Sales Automation | Service Automation

Data Mining | OLAP

Customer Data Warehouse

Back Office

Supply Chain Management | ERP | Computer Integrated Manufacturing | …..

Major CRM Vendors

Category	Vendor Company
Enterprise-wide back-end office	SAP AG Oracle Corporation Baan Company (now Invensys plc) PeopleSoft, Inc.
Front-end office	Siebel Systems Saratoga Systems Vantive Corporation (a division of PeopleSoft, Inc.) Clarify (a division of Nortel Networks) Onyx Software Corporation
Web-based front-end solution	Firstwave UpShot.com Rubric
Adhere to Microsoft Standards	Remedy Corporation Onyx Software Corporation
Midsize Player	Interact Commerce Corporation (previously SalesLogix) Sales Automation Group
Contact Management	Symantec Corporation Multiactive Software Inc. (Canadian)

Source: Gray and Byun (2001)

2003 A. Albadvi

Product Review: Comparison

Vendor	Product	Functions									
		Product Management	Web & Field Sales	Field Services	Partner Collaboration	Marketing Automation	Customer Service & Support	ERP	Analysis	Brand Management
Oracle	Oracle E-Business Suite/CRM		✓	✓	✓	✓	✓	✓		✓
People Soft	Vantive Enterprise		✓	✓	✓	✓	✓	✓		✓
Siebel System	Siebel ebusiness solutions	✓	✓	✓	✓	✓	✓	✓	✓	
SAP	CRM with mySAP.com	✓	✓	✓	✓	✓	Marketing Management	✓	✓	

Source: Gray and Byun (2001)

2003 A. Albadvi

CRM Solution Functionalities

CRM Solution Functionalities

Source:
http://www.techrepublic.com/printerfriendly.jhtml?id=r00620000908nor01.htm&rcode=

2003 A. Albadvi
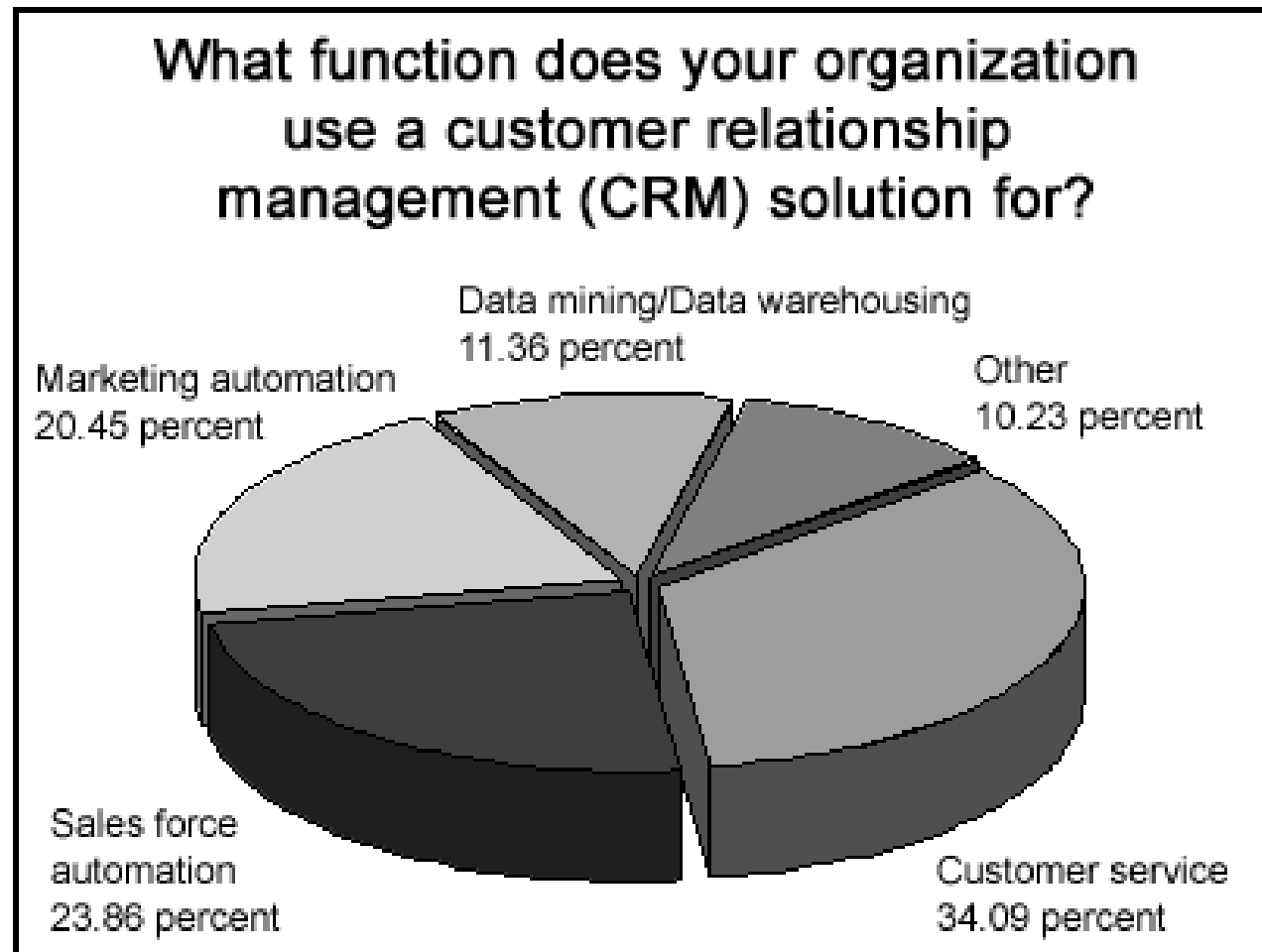
12 CRM Application Functionalities

- Opportunity management system(OMS)
- Sales configuration system(SCS)
- Partner relationship management (PRM)
- Interactive selling system(ISS)
- Interactive compensation management
- Content management
- E-Service
- Call management
- Field service and dispatch(FS/D)
- Personalization
- Data mart/Analytical
- Campaign management system

12 CRM Application Functionalities

- **Opportunity management system(OMS)**
  - Enables business-to-business(B2B) team selling across field and inside sales channels, guided sales executives to the next steps needed to close deals and manage revenue-generating sales activities

- **Sales configuration system(SCS)**
  - Enables enterprises to configure products, pricing, promotions, services, financing options and marketing bundles

- **Partner relationship management (PRM)**
  - Enhances an enterprise's ability to work with and leverage demand-network partners to better market, sell and service and customers.
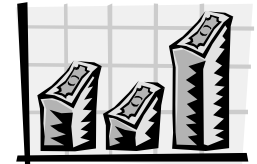
12 CRM Application Functionalities

- **Interactive selling system(ISS)**
  - Customer-facing technologies allow consumers and business to "sell themselves" and conduct transactions without a salesperson
    - Face-to-face: field salespeople or channel partners are in complete control of the ISS in a customer-facing selling situation
    - Web collaboration: sales representatives and customers share control of the ISS over a shared browser session
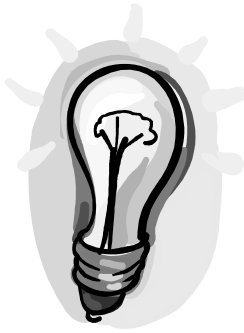
- **Interactive compensation management**
  - Manage and administer compensation plans, quotas, crediting and adjustments while processing commissionable capability for sales, management amd finance

2003 A. Albadvi

12 CRM Application Functionalities

- ## Content management
  - Allow enterprises to view and access content(e.g., text, graphics, animation and video)

- ## E-Service
  - Empower customers, partners and prospects for self-services and interactions with the enterprise via the internet, intranet or extranets.

- ## Call management
  - Log incoming telephone calls and transactions, and manage the transaction from initiation through closure

- ## Field service and dispatch(FS/D)
  - Workforce forecasting, scheduling, contract management, technician dispatch, defect tracking

12 CRM Application Functionalities

- ## Personalization
  - Determining an end-user's interest based on preferences or behavior, constructing business rules to select relevant content and presenting the content to the user in an integrated, cohesive format

- ## Data mart/Analytical
  - For ah hoc query, reporting and analysis,and supporting strategic decision making process

- ## Campaign management system
  - Used by marketers and sales organizations to design and execute single-channel or multi-cannel campaign and track the efforts of those campaign by customer segment over time

CRM Solutions for Medium to Large Enterprise

CRM Solutions:
Market Share

CRM Vendors	Market Share (2000)
Siebel (eBusiness 2000)	28.9%
Clarity (eBusiness Solution)	7.4%
Broadvision (Enterprise one-on-one suite)	6.7%
Oracle (eBusiness Suite: CRM 11i)	5.4%
PeopleSoft (PeopleSoft 8)	4.9%
Onyx (Onyx 2000)	2.4%
SAP (mySAP)	1.8%
Applix (iCRM Suite)	1%

CRM Solutions for Small to Medium-Size Business

CRM Solution for Small to Medium-Size Business

- Product Review
  - ACT!2000
  - SalesLogix
  - SuperOffice CRM5

Product Review: ACT!2000

- Basic contact management function: storing company and contact data, registration of activities and contacts, diary maintenance.

- No campaign, marketing or service management

No. of User Company	1,000,000
No. of End User	3,500,000
Flagship Customers	Fed Ex
License Fee for copy	US$199 retail, US$189 download

ACT!

Product Review: <u>SalesLogix</u>

- Mid-market CRM Leader

- Connectivity links with ERP and financial packages

- Online SalesLogix.net has close ties to Microsoft

- Strong network of "Business partners"

- Provide customizing, implementation and after sales services

No. of User Company	3,500
No. of End User	350,000
Flagship Customers	Tiffany & Co., E-Trade, British Airways
License Fee for copy	Basic Server US$ 4,995 + $595 per user Advanced Server, US$11,995

SALES LOGIX

<u>Demo</u>

Product Review: <u>SuperOffice</u>

- Most user-friendly CRM solution
- Mission: make uncomplicated products that sales and marketing people will enjoy using
- Tight integration with MS Word and Excel

No. of User Company	22,500
No. of End User	225,000
Flagship Customers	Toshiba PC, KBMG
License Fee for copy	US$ 500-US$300 depending on number of users

Product Review: SuperOffice