

Customer Relationship Management (CRM)

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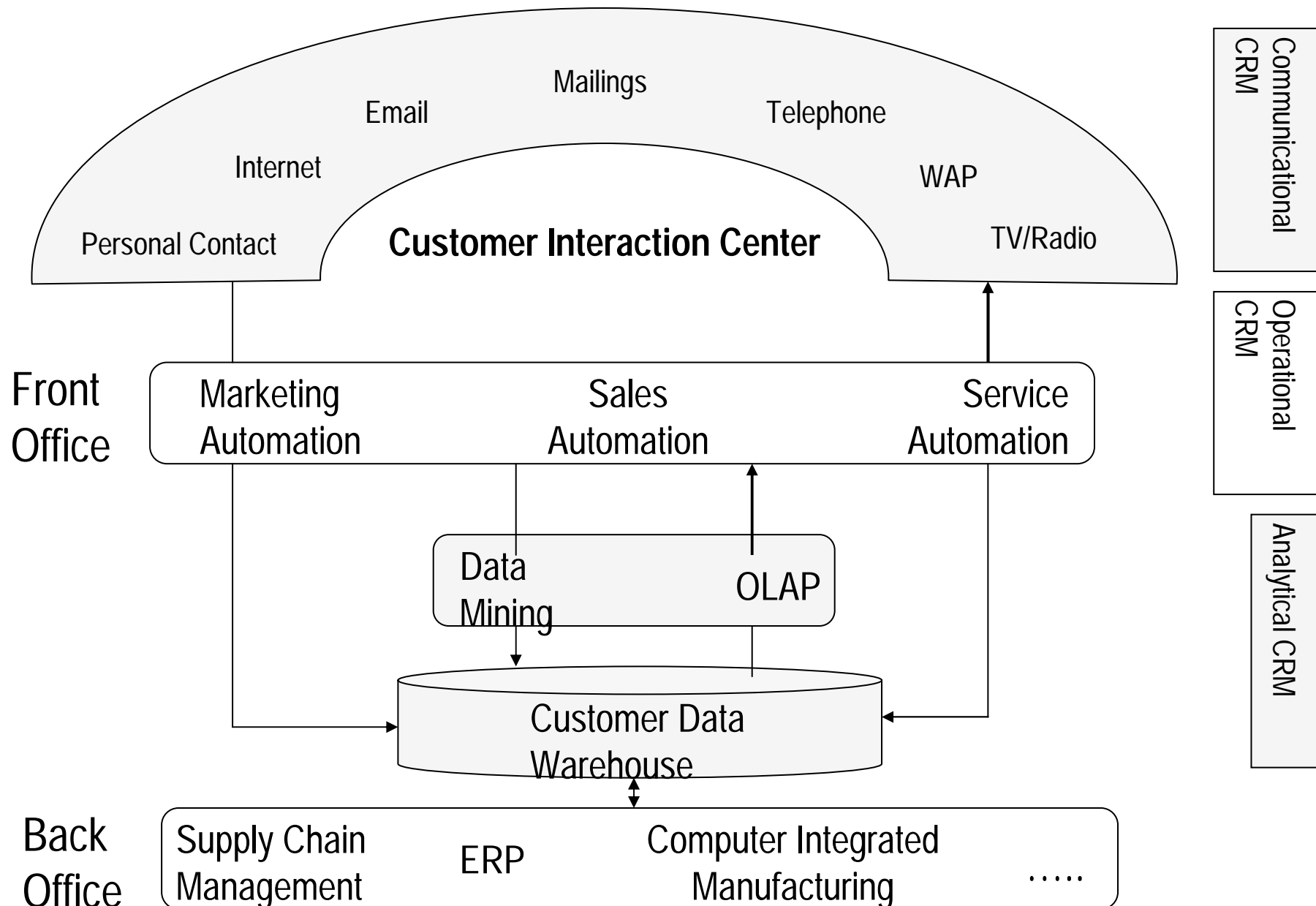
Session#3: Agenda

- 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



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
Midsized Player	Interact Commerce Corporation (previously SalesLogix) Sales Automation Group
Contact Management	Symantec Corporation Multiactive Software Inc. (Canadian)

Source: Gray and Byun (2001)

Product Review: Comparison

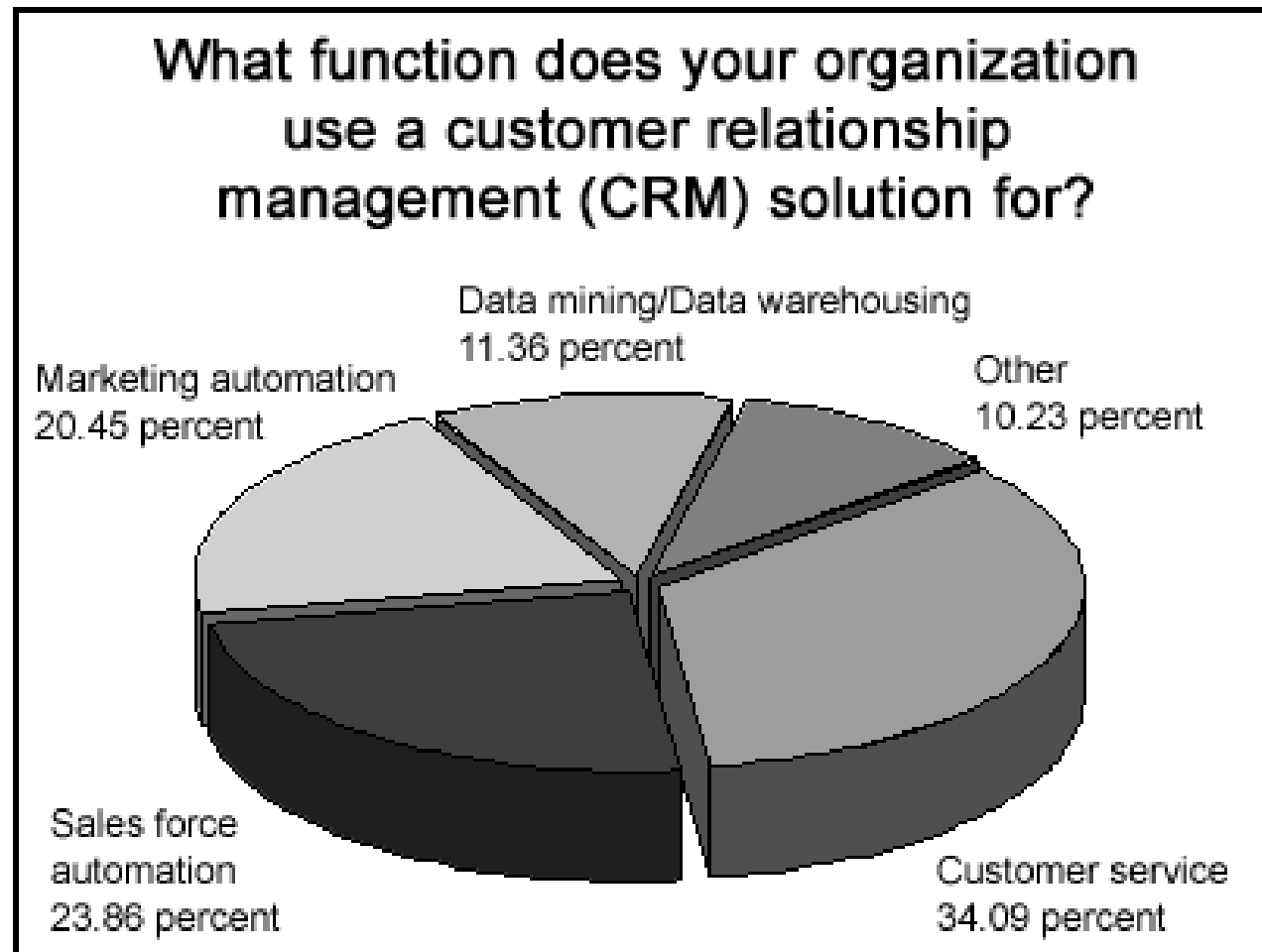
Vendor	Product	Functions								
		Product Management	Web & Field Sales	Field Services	Partner Collaboration	Marketing Automation	Customer Service & Support	ERP	Analysis	Brand Management
Oracle	Oracle E-Business Suite/CRM		✓	✓	✓	✓	✓	✓		✓
People Soft	Vantive Enterprise		✓	✓	✓	✓	✓	✓		✓
Siebel System	Siebel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

Source: Gray and Byun (2001)

CRM Solution Functionalities



CRM Solution Functionalities



Source:

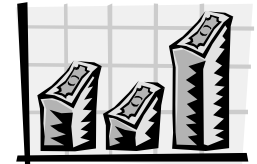
<http://www.techrepublic.com/printerfriendly.jhtml?id=r00620000908nor01.htm&rcode=>

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

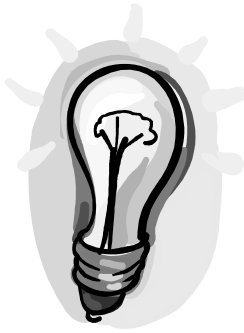
- Opportunity management system(OMS)
 - Enables business-to-business(B2B) team selling across field and inside sales channels, guided sales executives to the next steps needed to close deals and manage revenue-generating sales activities
- Sales configuration system(SCS)
 - Enables enterprises to configure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

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 ad 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-channel 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



Product Review: SalesLogix

- 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



Demo

Product Review: SuperOffice

- 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



SuperOffice.

Implementation of SuperOffice CRM5

Company: Internal Responsible: Dave Mishchenko

Test Agresso HW HP Prod. Agresso HW HP
 Test DB SQL server Prod. DB Oracle
 Test DB HW HP Prod. DB HW HP
 Test DB OS Win 2000 Prod. DB OS Win NT
 Test Network Prod. Network
 Test WEB HW Prod. WEB HW
 Test WEB OS Prod. WEB OS Win 2000

Registered: 11/30/2000 DAVE Last modified: 2/7/2001 GAL

Project Members

Contact	Name	Function	E-mail	Telephone
SuperOffice ASA	Erik Eide	External Cons...	erik.eide@superoffice...	22 51 78 30
Agresso Corporation	Lars Noren	Project Initiator	lars.noren@agresso...	004 664 232 3...
agresso Corporation	Gaute Syversen	Project Member	gaute.syversen@agresso...	350-453-1632
agresso Corporation	Vam Lav	Project Member	vam.lav@agresso...	513-564-0400
agresso Corporation	Andrew Clark	Project Manag...	andrew.clark@agresso...	250-704-4489

SALE

Company: Agresso Corporation
 Contact: Charles Johnston
 Project: Implementation of SuperOffice CRM5
 Title: Sale of 100 licenses Agresso
 Amount: 0.00 USD

Total cost: -600,000.00
 Profit: 600,000.00 0.00 %

SuperOffice No. 10056

Associate: Gaute Syversen
 Source:
 Document:
 Visible for: All

☐ Completed Registered: Never modified

Product Review: SuperOffice

SuperOffice CRM 5

File Edit View Company Diary Project Segment E-mail Help

Implementation of SuperOffice CRM5

Wednesday 2/7/2001

Feb 2001

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7 12 13 14 15 16 17 18
8 19 20 21 22 23 24 25
9 26 27 28 1 2 3 4
10 5 6 7 8 9 10 11

Nav Print Find

Type	Internal	Responsible	Dave Mishchenko
Test Agresso HW	HP	Prod. Agresso HW	HP
Test DB	SQL server	Prod. DB	Oracle
Test DB HW	HP	Prod. DB HW	HP
Test DB OS	Win 2000	Prod. DB OS	Win NT
Test Network		Prod. Network	
Test WEB HW		Prod. WEB HW	Win 2000
Test WEB OS		Prod. WEB OS	Win 2000

Registered: 11/30/2000 DAVE Last modified: 2/7/2001 GAL Edit

Project Members

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SuperOffice ASA	Erik Eide	External Cons...	erik.eide@superoffice...	22 51 70 30
Agresso Corporation	Lars Noren	Project Initiator	lars.noren@agresso...	001 604 292 3...
Agresso Corporation	Gaute Syversen	Project Member	gaute.syversen@agresso...	360-413-1602
Agresso Corporation	Vern Law	Project Member	vern.law@agresso.com...	513-564-0400
Agresso Corporation	Andrew Clark	Project Manag...	andrew.clark@agresso...	250-704-4499

Add

Appointment Task Phone Call Sale Note E-mail Write

SALE

Company: Agresso Corporation

Contact: Charles Johnston

Project: Implementation of SuperOffice CRM5

Title: Sale of 100 licenses Agresso

Amount: 0.00 USD

Save Cancel Help Print

Status Details More

Total cost: -600,000.00

Profit: 600,000.00 0.00 %

SuperOffice No. 10056

Associate: Gaute Syversen

Source:

Document:

Visible for: All

Completed Registered: Never modified

SuperOffice CRM 5

File Edit View Company Selection Project Diary E-mail Help

Annual Meeting 2001

Thursday 21.09.2000

Sep 2000

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Nav Print Find

Registered: 07.09.2000 EE Never modified Edit

Project Members

Date	Type	Text	Company	Contact
11.09.2...	Outg...	Phone out	SuperOffice...	Hemander, Robert
11.09.2...	Incom...	irc phone	SuperOffice...	Hemander, Robert
11.09.2...	Demo	demo app	SuperOffice...	Hemander, Robert
11.09.2...	Telefax	Fax test	SuperOffice...	Hemander, Robert
11.09.2...	Letter	Text outgoing letter	SuperOffice...	Hemander, Robert
11.09.2...	Varia	20000 Fake sale to give me more money	SuperOffice...	Hemander, Robert
11.09.2...	Follow...	follow up	SuperOffice...	Hemander, Robert

Delete Filter show all show Activities Documents Sales

Appointment Task Phone Call Write E-mail Sale Note

