SI-Consulting S.A.

Manage Customer Relationships

Our competence is SAP CRM
Best-run businesses use SAP solutions

We have the honor to support them in achieving success!

The consultants of SI-Consulting have advised such companies as:

Merely gathering customer information is a road to nowhere. But the skillful use of this information is a highway to success.

More details on selected references of SI-Consulting S.A. on the following pages.

From the beginning of our activity, we have focused on SAP solutions with an emphasis on high quality of the provided services. We closely cooperate with SAP, which is confirmed by our SAP Gold Partner status. The Partner ecosystem is a group of experienced and proven companies that meet SAP’s requirements for e.g. the number of certified consultants, project managers or sales persons authorized to offer SAP licenses. With the authorizations to provide SAP Enterprise Support or SAP Standard Support services, SI Consulting also ensures a proper post-implementation support.

The Top Quality – Quality International program is organized under the patronage of the Ministry of Regional Development, the ISO 9000 Polish Forum Club and the Polish Agency for Enterprise Development. The award “QI services – the Top Quality Services” granted to SI Consulting S.A. confirms high standards and top quality of its services.

SI-Consulting is the winner of the Business Fair Play program. The competition aims to reward companies that demonstrate reliability and honesty in relationships with business partners, employees, local community and authorities. The idea is to encourage all businesses in Poland in ethical behavior towards business partners and employees and to build positive relationships with the local community while maintaining respect for the environment.

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SAP CRM - Customer Relationship Management

The SAP CRM solution is an integrated tool that supports all business processes related to customer service in its broadest sense. What exactly are CRM systems? What were the reasons for their creation? What are the benefits of their implementation? Information available on pages 6-7.

SAP CRM offers a full range of functionalities for marketing, sales and after-sales customer care (i.e. service). A description of proposed functionalities is available on the following pages:

- CRM Marketing — pages 10-11
- CRM Sales — pages 12-13

Access to SAP CRM modules is possible through various communication channels. In addition to the traditional access, the system can be accessed through mobile applications, Contact Center functions, customer self-service portals, and partner portals. Specific features of available communication channels are described on the following pages:

- Interaction Center — pages 16-17
- Web Channel — page 18
- Mobile CRM — page 19
- Partner Channel — page 22.

SAP CRM worldwide:

Analytics
In response to growing customer requirements for the processing of data generated in the CRM module, SAP began to introduce newer and more advanced functionalities for data analytics. More information on page 23.

End-to-end process management
The end-to-end process management, linking the front-office with the back-office, provides many benefits – the most important of which is the ability to get a full view of customer data. The solution for the integration with the ERP system as well as many other interesting solutions developed by the SI Consulting team can be found on page 8.

Industry Solutions
SAP CRM provides solutions dedicated to specific industries. Currently, 26 industry solutions are offered, developed in collaboration with the sector leaders, such as solutions for utilities, banking, pharmaceutical industry, and education. A description of sample industry solutions is available on page 9.
CRM is a strategy for maximizing company profits based on understanding individual customer needs and on increasing customer satisfaction.

CRM is a strategy for maximizing company profits based on appropriate relationships with a customer.

CRM is a business strategy that helps organizations cope with the three most important imperatives: generating growth, gaining operational excellence and improving competitiveness.

CRM is not a technology, but a strategy for managing customer relationships. The technology supports the implementation of the strategy.

SAP CRM provides end-to-end support for effective implementation of the customer service strategy and offers the following benefits:

- effective customer segmentation capability
- more accurate market forecasts, shopping cart analysis and profitability analysis
- increased customer loyalty and satisfaction
- more accurate product and service profiling, including creation of personalized offers that facilitate up-selling and cross-selling processes
- consistent and better synchronized information used in all forms of contact with customers
- improved service quality and faster resolution of quality issues
- shorter sales cycle and reduced sales process costs

SAP CRM is a leading solution in the market. It has a number of advantages that position it among the leaders. According to Forrester Research, it is one of the products in the market that offer the most functionally complete and the most useful solution.

The SAP CRM implementation is an integrated solution that supports all business processes related to customer service in its broadest sense. With SAP CRM, businesses from all industries can plan and implement all their marketing and sales activities and analyze their efficiency. The newest version of this solution — SAP CRM 7.0 — has a new, fully personalized and intuitive user interface based on Web Technology. It allows for a flexible adjustment of the scope of displayed information to individual user needs, while its open technology (XML, Webservices) enables easy integration of the system with third-party applications.

SAP CRM - Customer Relationship Management

The increasing globalization poses growing challenges for businesses: increasing competition, rising costs while prices fall, fading differences between products, growing number of sales channels and increasing customer awareness. On the other hand, there are many internal problems, such as: lack of consistent customer information in an organization (part of the customer data held in notebooks and employees’ drawers), devoting more time to looking for the information than to the sale, lack of sales process monitoring, lack of professional customer service. These and other market challenges and internal problems forced the creation of IT tools to support customer relationship management.

SAP CRM - Customer Relationship Management

In 2009, SI-Consulting implemented SAP CRM in the Impel Group. So far, it is the largest CRM implementation in Poland. The size of the implementation stands out both by the number of system users — more than 500, and by its wide functionality. By using the SAP CRM system, Impel offers services as cleaning services, property rental (property maintenance), protection of property, HR and payroll services, temporary recruitment, rental and maintenance of clothing, laundry services, logistics, catering, and hosting services. With the implemented system, it also supports a widely understood service and marketing. Additionally, a multi-channel communication platform, the Contact Center, integrated with SAP CRM (complaint management, service information) was launched in the Impel Group.

In PGNiG Group, experts from SI-Consulting are responsible for the development of current business processes, optimization of the existing SAP CRM functionalities and preparation of the system for the roll-out to other European countries. Now, SAP CRM is used in two countries: France and Germany. The project scope, which brings together the SAP experts from Poland, France and Germany, includes managing sales and implementation processes, planning, optimizing and reporting the employee sales and service activities, and recording customer requests in the Customer Interaction Center. The processes for handling requests by employees with automatic request monitoring as set forth in their SLA are also launched.

In TEB S.A. (Towarzystwo Edukacji Bankowej S.A.), the consultants from SI-Consulting were responsible for the entirety of the SAP BW (Business Warehouse) implementation — from the business blueprint preparation, to the configuration of environments and installation of business models, to the design and development of queries. In BW, we focused mainly on the finance and controlling areas. Additionally, the technical content package was implemented to support system administration and optimization. The reporting layer was built based on the Query Designer and BEx Analyzer applications with the Excel environment (of the SAP Business Explorer package). The project also covered a series of workshops ensuring the knowledge transfer to end users and administrators. With the implementation, TEB S.A. gained the possibility to make cross-sectional analysis and to merge the financial data from different areas and sources in one place.

SAP CRM - Customer Relationship Management

Increased revenues
30-50% increase in marketing campaign coverage
- Up to 20% increase in cross-selling and up-selling
- 8-10% higher close rates

Higher profit
- 30-50% increase in up-selling
- 10-15% reduction of service costs
- 3-5% higher customer retention rate

Operational excellence
- 15-25% shorter issue resolution time
- Up to 20% reduced order fulfillment cycle
- Increased revenues
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SAP CRM - Customer Relationship Management

SAP CRM is a technology which helps customers implement the customer relationship management strategy.

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SAP CRM supports front-office processes. Integrating with the ERP system areas, it links the front office with the back office. These processes can be used to make innovations and diversify customer experience by different interaction channels, which translates to a higher profit and a greater customer satisfaction.

**SAP CRM - End-to-end process management**

How to invoice the services sold in CRM in the ERP system?  
The system is for the user – you can find this slogan on numerous leaflets released by manufacturers of systems for enterprises. In practice, however, this promise is not always easy to keep. How to team an extensive CRM system which stores customer, contract, and offer data with a classic approach to handling the invoicing in ERP?  
And how to invoice services from CRM, retaining the consistency in the SD module of the ERP system?  
With the integration of SAP CRM with SAP ERP, you don’t even notice that you work on two different systems. The CRM system manages the full cycle – from the identification of a sales opportunity by marketing, through the transfer of the sales opportunity to the sales organization and generating an offer to a signed contract or order placed. CRM objects support one-time sales and contracted sales, both flat-rate-based and occasional. The system stores all contracted data, prices, rates, discounts and quantities. The team of SI-Consulting developers and consultants have experience in the integration of CRM with the SD module. Information on each sales is sent automatically or on request (depending on customer requirements) to the ERP system as a sales order, which is the basis for invoicing the customer.  
With appropriate mechanisms, data consistency is maintained. The information on document numbers generated in ERP (sales order number, stock transfers, invoices, deliveries) is sent back to CRM. Additionally, with an appropriate configuration, these documents can be accessed from CRM without the need to log on to the ERP system. Integration of CRM and SD documents requires also integration of business partner and product master data. The approach recommended by SI-Consulting is to create business partners in CRM and replicate to the ERP system only the records for real customers. Prospects are stored only in CRM. With the properly defined authorizations, the Business Partner data is consistent in both systems. Products, on the other hand, are replicated to CRM from the MM module of the ERP system.  
Alternatively, SI-Consulting offers implementation of the entire sales process only in the CRM system. If the customer doesn’t have the SD module implemented, the invoicing process may be conducted in CRM. Then, the integration takes place at the CRM-FI level. The experience and solutions developed by SI-Consulting enable end-to-end sales process management, with the option of invoicing both in CRM and in ERP.

SAP CRM for Banking  
Resilient banks need comprehensive information on each customer 24/7, 365 days a year. Irrespective of the place of interaction with the customer, product type and specificity of the business, it is important to find a way to respond to the changing market needs and to launch new products faster and more efficiently than ever before. CRM with MySAP Banking is an end-to-end solution providing banks with all functions they need to efficiently run their business. The solution encourages employees and customers to keep in contact through different communication channels, delivers customer data from all business areas, supports market positioning programs and their effectiveness measurement methods.

SAP CRM for Higher Education  
New functionalities within SAP Campus Management support higher education institutions in winning students. MySAP CRM supports recruitment of students from the planning stage to enrolment through the following functionalities: candidate master data management (including data import from different sources), campaign management, mobile applications and interaction center support. They support current recruitment processes and facilitate their streamlining. The functions for the evaluation of costs and performance of campaigns allow of continuous development of student recruitment strategies.

SAP CRM for Public Sector  
Public institutions face growing customer demands for e-government services. A small service budget, outdated management processes requiring optimization and taxpayers requesting adequate quality of services for the taxes paid. The answer to this may be SAP CRM for Public Sector. MySAP CRM for Public Sector is an integral part of the e-government solution, offering services for public administration. It allows organizations to efficiently support citizens through the use of various forms of contact. At the same time, all relevant customer data is available. Communication based on Internet technology allows you to send applications, define administrative processes, store case files on the sever, submit forms and applications, use the data from other systems and integrate citizen accounts both for administrative charges and taxes. This solution supports also customer interaction centers, CRM analytics, campaign management, and even the online payment and settlement system. All citizen data is entered only once. Then, it is made available only centrally by the system to all employees having contact with customers.
SAP CRM Marketing

SAP CRM offers a centralized marketing platform which allows you to plan, perform and analyze all marketing activities with the use of different customer interaction channels. The integrated application allows marketing organization employees to get a complete business insight based on which they can make informed decisions and carry out complex operations.

SAP CRM supports all key marketing processes and contains the following functionalities:

Marketing resource management and brand management
SAP CRM helps in getting more control and a precise view of marketing processes. It supports management and optimizes the use of marketing resources, such as budget, people, time and assets, as well as their adjustment to strategic marketing goals. The tool supports you in raising brand awareness among customers and facilitates collaboration among team members and coordination of marketing activities within the company.

Segmentation and external data management
SAP CRM enables the use of customer data from external lists for certain marketing activities in a specific time horizon without the need for support from IT.

Campaign management
SAP CRM supports marketing campaign management and performance of all marketing activities by using inbound and outbound customer interaction channels, such as direct marketing, e-mail, phone, Internet, fax and texts.

Trade Promotion Management
SAP CRM supports central planning and alignment of all sales activities related to promotion. It allows you to control the effectiveness of sales promotions on many planning levels: product, product category, customer and segment. It optimizes the distribution of sales goods to get the best possible sales results and strengthen the brand in the market.

Lead Management
Automating the lead management process from the lead generation, assignment of an appropriate priority, processing and distribution to further actions.

Real-Time Offer Management, RTOM
SAP CRM provides powerful, self-learning analytical tool which supports real-time offer management (allowing you to take into account all necessary information available in the system to take the most appropriate steps).

Customer segmentation

A lot is heard about CRM systems for storing business partner data. Manufacturers of CRM systems boast their systems that can record all data, not only address or sales data, but also information pertaining to date of birth, favorite sport, and any other information that may be useful in building the best possible relationships with the customer. However, in order to bring any benefit and to ensure that this data is not just wasted space in the system, a data mining concept needs to be developed. The customer segmentation tool is a very important aspect of marketing functionality CRM, which in a friendly and intuitive way analyzes gathered data. The data is filtered based on the input parameters. You can, for example, filter the customers with whom you’ve had no contact for the last 3 months and who placed an order exceeding 50 thousand euro last year. The segmentation tool allows you to filter the customers to whom specific marketing or sales campaigns will be addressed.

Key benefits from the implementation of SAP CRM Marketing:
- Adaptation of marketing resources to effectively support the goals of the organization
- Reflection of return on marketing costs
- Acceleration of marketing processes with more accurate control
- Managing customer demand through targeted, personalized marketing messages
- Identification and retention of customers through loyalty programs

The SI-Consulting team implemented the sales module in Comp Safe Support, formerly CSS. The implementation included business partners, sales territory management, opportunities, offers, sales orders and business contacts.

The SI-Consulting team implemented the marketing module in Comp Safe Support (formerly CSS). In the area of marketing, the implementation included campaign management and automation, creation of target groups, customer segmentation, marketing research surveys and lead management.

Data migration – the subject that keeps customers up at night turns out to be not that bad. SAP offers a wide range of data import options – from a customer base, price lists, contact histories, to contracts. The mechanisms used in the system have the capacity to map, aggregate, and distribute the attributes from legacy systems to the appropriate data structure in the CRM system. Also, a wide range of input validation options ensures a complete success of this important implementation phase and smooth go-live of the new system.

Developers from SI Consulting developed an interface to support sales leads in Randstad. The interface automated the creation of leads in the marketing department.

We implement SAP by sharing the knowledge and experience www.si-consulting.pl
SAP CRM Sales

SAP CRM creates conditions for a more effective and efficient sales process for sales managers. It provides the knowledge needed to turn the market insight into appropriate actions, and to acquire, grow and retain valuable relationships with customers. The application helps you plan, execute, and analyze sales operations throughout the entire cycle, identify new ways to accelerate sales decisions, discover potential sources of income, and implement new methods to increase productivity.

Sales planning and forecasting
SAP CRM helps increase performance through coordinated planning and generating sales activities across all channels. It presents a complete picture of expected revenue and expected sales volume during a specific period.

Sales territory management
SAP CRM helps optimize coverage and distribution of sales resources within clearly defined sales territories.

Business partner management
SAP CRM provides access to key contacts, key relationships between business partners, detailed customer profiles, as well as statuses of last interactions over a given period and for a specific location.

Sales activity management
SAP CRM supports the management of customer visits, account profiles and supported sales process activities. It facilitates collaboration and synchronization of e-mails, business contacts, calendar entries, and tasks with leading groupware solutions.

Acceptance of an offer in CRM – the end of problems with unprofitable contracts.
In the case of a bidding process or negotiations that take place quickly, under time pressure, it is easy to take the wrong decision which will result in an unprofitable contract. You can suffer the consequences of an erroneous valuation for a very long time. With a large sales department, however, it is hard to avoid them. There is often neither time nor appropriate tools for the offer to be evaluated by all stakeholders.

The CRM team of SI Consulting’s developed a workflow that enforces the acceptance of the offer by relevant people. Choosing the right resources (quantity and level in the organizational structure) for the acceptance depends on the characteristics of the signed contact, such as the value and the margin on the contract. The implementation of workflow on the one hand protects against a wrong decision by engaging relevant resources, and on the other, improves the offer acceptance process by eliminating excessive paperwork, ensuring a rapid flow of information between stakeholders. When appropriate reminders to superiors are implemented, you don’t have to wait too long for acceptance.

Additionally, it is possible to redirect acceptance to an e-mail inbox. The recipient will get a message with the necessary set of data, also with an attachment (e.g. xls or doc). A full set of data allows the recipient to decide whether to accept or reject the offer, all without having to log on to CRM. The workflow operates on the developed, flexible CRM structure. In addition, in order not to delay the acceptance, it takes into account holidays, leaves and replacements.
The solution developed by SI-Consulting significantly reduces the time of offer acceptance, with more people

Opportunity management
SAP CRM supports tracking, qualification and distribution of leads to the most appropriate sales professionals. It allows you to monitor the conversion of an opportunity into the actual income for the company and to track orders throughout their fulfillment process.

Quotation and sales order management
Precise generation of quotes, creation of orders for the customer, confirmation of product availability and tracking of orders throughout their fulfillment process.

Product configuration and price management
SAP CRM supports sales professionals in the process of product configuration so that the products meet customer requirements.

Invoicing and contract management
SAP CRM helps you manage long-term customer contracts, include discount agreements in the ongoing sales process and monitor sales processes from the inquiry to the completion of the process. It provides integration with the financial module.

Bonus and commission management
SAP CRM supports the development, implementation and management of compensation plans to maintain and motivate sales professionals to perform their best, allowing them to track performance and simulate potential compensations for open transactions.

Key benefits from the SAP CRM Sales implementation:
• Maximizing revenue growth
• Focusing the sales resources on productive activities
• Optimizing the value delivered through customer interactions

SAP CRM supports the management of customer visits, account profiles and supported sales process activities. It facilitates collaboration and synchronization of e-mails, business contacts, calendar entries, and tasks with leading groupware solutions.

Automation of work in CRM
The time spent on the system is a wasted time. This view is very common during the implementation of any CRM system. With SAP solutions, the time spent on the system is reduced to a minimum. The system offers a number of solutions to accelerate the work of sales staff, such as:
- direct links to the most frequently or most recently used objects,
- links to the stored search parameters,
- copying of relevant data between operations in a sales cycle,
- automatic determination of data from already existing contract objects in the service process
- automation of task creating activities and sending notifications, reminders, and system alerts
- active, print-ready forms.

The consultants from SI-Consulting took part in the implementation of CRM in Carlsberg in Serbia and Bulgaria. Implementation of functionalities such as business partners, stores as business partners, opportunities, offers, contracts, sales orders, sales contacts, offer acceptance workflow and CRM-ERP integration.
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SAP CRM Service

CRM service – we have to not only win, but also retain the customer
It is much harder to win back a once lost customer than to retain him. That is why a proper after-sales service is so important. Not every company has developed a strategy in this aspect, and not every company knows which tools to use. The CRM Service solution offered by SI Consulting provides support for proper after-sales customer service through efficient management of contracts, orders, and customer complaints.
As part of the developed solution, implemented are contracts with the SLA times assigned, such as first reaction time and repair completion time. When a deadline is approaching, appropriate reminders are sent to persons responsible and/or supervisors.
In the event of a customer complaint, mechanisms have been developed to efficiently transmit this information to the people in the organization to resolve the problem as soon as possible. Similarly, if a service is ordered, there are mechanisms to redirect the order to the right people to fulfill it in the best possible way and on time. The solution developed by SI-Consulting supports customers in efficient retention of their customers.

SAP CRM maximizes profitability of the service by building customer loyalty, reducing operating costs, and in effect increasing profits from service operations.

Service contract management
SAP CRM supports service contract management, including automatic verification of authorizations to use the contract, service level (SLA) management and alerting about an expiring contract.

Customer service and support
SAP CRM provides access to information about the history of the service, contracts and service authorizations, SLA, installed base and warranties through an easy-to-use screen of the Customer Interaction Center.

Returns and depot repair
SAP CRM automates the entire process of returns and repairs, including material return authorization, billing, shipping of repaired products to customers and the issuing and tracking of the rented equipment.

Resource and field service management
SAP CRM supports planning and allocation of resources to meet the demand by using a Gantt chart, geographic maps or an optimization tool. It allows you to fulfill and confirm service orders and to manage spare parts through a mobile application.

Key benefits from the SAP CRM Service implementation:
• Higher percentage of issues resolved at the first contact owing to the information and resources needed to solve the problem
• Increased customer loyalty by providing technicians with the right skills and equipment
• Increased use in the field through the optimization of resources and easy access to information
• Increased revenue by offering products and services based on customer needs
• Reduced returns by enabling customers to solve their problems and proactive elimination of known product defects

Warranty and claim management
SAP CRM manages warranties and claims from their submission to their settlement and analysis. It supports coordination of collaboration with external partners in logistics to avoid delays in the process.

Installations and maintenance
SAP CRM supports tracking of customers’ installed base of products and their configuration with graphical visualization. The control over customer installations allows you to forecast potential maintenance tasks, which results in a fast and effective execution of business processes, and to predict the impact of new products in the installation on the service as well as to minimize downtime through planned maintenance.

Parts logistics and finance
SAP CRM supports parts inventory management and parts procurement through the integration with SAP ERP logistics. It streamlines invoicing, revenue recognition and cost allocation through the integration with SAP ERP financial capabilities.

IT service management
SAP CRM streamlines IT helpdesk operations with ITIL-compliant solution for incidents, issues and change requests. It allows you to increase customer satisfaction through an appropriate SLA level, knowledge bases and analytics. It provides compatibility between IT and business operations through the integration of SAP CRM and SAP ERP.

The implementation of the service module included service contracts, service orders, SLA, complaints, installations and objects.

Within the service module, a series of functionalities were implemented in the Impel Group: service contracts, service orders, complaints, installations, integration of the installation with the PM module.

As part of the project, such functionalities as service orders, service contracts, service integration with ERP were optimized and extended.
Key Performance Indicators in CRM

It is difficult to have an impact on the performance of the organization and its processes without defining suitable gauges, i.e. key performance indicators, for customers, employees, processes, channels and products. It is necessary to determine current performance levels, benchmark best practices, set challenging improvement goals, and ensure ongoing monitoring and reporting on performance. The SI Consulting team have developed a set of indicators to measure the Contact Center performance. Based on their knowledge, experience and best practices, they identified the following indicators: the number of inbound calls, the number of outbound calls, average time of handling the call, i.e. the connection time plus service time after disconnection, including the components (since 40 +10 has a different value than 25 +25 ). The number of successful contacts during the first call, the so called first call resolution, average queuing time, the degree of agent’s workload, the conversion ratio representing how the number of calls translates to specific predetermined goals, e.g. the percentage of calls resulting in the conclusion of the transaction.

Business Objects Xcelsius Dashboards were used for tracking KPIs. The tool features an intuitive interface, variety of presentation forms (graphs, dashboards, what-if analyses), no need for any programming (wizards), and the capability of being run from SAP CRM.

Key benefits from the implementation of SAP CRM Interaction Center:

- Interaction Center management and administration – the system supports the defined customer service guidelines with the ability to define a user interface adjusted to different employee roles. Furthermore, the Interaction Center management and administration are supported by alerts, notifications, workflow mechanism, scripts of interviews, and the monitoring of key processes and statuses of the currently solved problems.
- Integration – a multichannel customer service (e-mail, phone call, text message, chat, Web) is supported through the integration with external SAP systems, like SAP Business Communications Management (SAP BCM), and third-party systems. Through the use of standard interfaces (web services), the system allows of a rapid integration with the systems that were not SAP-enabled.

Within the Customer Interaction Service solutions, SAP CRM supports the following key business processes:

- Marketing – the support for the process of winning customers on the phone through creating a list of prospects and making it available, interview scripts, access to a list of current promotions, history of contacts with a prospect, etc. The information acquired from the customer in the telemarketing process automatically becomes a source of data for marketing analyses and reports, giving an opportunity to increase the effectiveness of marketing activities.
- Sales – the support for the interaction process in the sales process through automatic mechanisms suggesting a potentially interesting offer for the customer during the interaction with them (e.g. on the phone). The mechanism of suggesting products allows for the current customer service context (e.g. the selected products), as well as the history of similar transactions registered in the system.
- Customer service – management of phone calls, e-mails and chat is integrated with the standard interface of SAP CRM, so while dealing with a customer it is possible to carry out all business operations, such as product returns, service planning, technical assistance, etc.
- IT support – the system lets you build a support center based on ITIL methodology by supporting standard processes: management of changes, incidents and issues, etc. Within the SAP CRM solution, the technical support staff can also build and search a centralized knowledge base, which is fully integrated with the system interface.

Phone calls in CRM

An e-mail, text message, phone call, website contact form – these are standard channels of communication with customers. Each renowned customer interaction center launches as many channels as possible so that the customers can choose a convenient way of communication for themselves. Anyone can submit a request in the manner most convenient to him. The most important thing is that the level of service is equally high regardless of the selected channel. Companies cannot afford shortcomings here, they need to offer their customers multi-channel, professional services.

The Webclient solution offered within SAP CRM is your best bet. The tool is flexible and includes a number of features facilitating the work of the agent, such as efficient customer identification, interaction history, ability to define scripts, fast call registration, PBX integration, as well as recording and storing calls. The tool is a part of SAP CRM so there is easy access to all data recorded in CRM without the need for the system integration. Appropriate tool design is the most important to improving service quality and reducing service time. Consultants and developers from SI-Consulting developed an optimal model to always keep customer service at a high level, regardless of the communication channel. All service requests end up in one destination, which provides the same level of service. An agent has such a range of customer data and customer interaction history data which guarantees a comprehensive service and reduces the customer service time. What is more, the designed model enables easy expansion of the customer interaction center if new services are launched, or new customers or branches are added. The agent is supported by the customer identification functionality and the access to key customer data. If the agent is not able to resolve the issue reported by the customer, he has access to the scripts and the knowledge base. If the agent does not get the answer there, he can use mechanisms that automatically, based on the request’s characteristics, redirect the request to appropriate specialists within the organization.

The experience and solutions developed by SI-Consulting significantly increase the Contact Center efficiency.
SAP CRM provides web-based applications that make it possible to effectively use the Internet channel for sales, marketing and service, reducing transactional costs and telephone communication costs. As a result of the implementation of SAP CRM, the customers will have access to customer self-service tools in the following areas:

- **E-marketing**
  Provides customers with personalized access to the most relevant information, such as product catalog (including the capability of searching data, viewing details, checking availability and creating orders), suggested additional purchases, and lists of best-selling products. The tool facilitates the execution of marketing campaigns by allowing the customer to search for a product by campaign. It also supports the customer loyalty management, including joining a loyalty program, collecting points and viewing the history.

- **E-commerce**
  The platform supports the Internet sales, both B2C (Business-to-Consumer) and B2B (Business-to-Business), by offering customizable online store templates for various industries. It supports the entire online sales process, including inquiries, order management, pricing, contracts, online auctions, interactive sales and selling via partners.

- **E-service**
  An intuitive self-service channel that allows the user to register products, manage a user account, request a service visit, register a request, track a request and check its status as well as to manage complaints, i.e. log complaints and returns, track them and check their statuses. The tool supports the customer in searching for the information based on the knowledge base (search for knowledge, FAQs) and on communication via e-mail and chat.

### Benefits from the implementation of SAP CRM Web Channel:

- Improved customer satisfaction through access to services 24/7
- Boosting sales by expanding the market to include Internet channel
- Managing customer loyalty and demand through personalized e-marketing campaigns
- Supporting the self-service with the intuitive web application
- Making the knowledge base available with a specific authorization profile which can support the customer before they report an issue or use other communication channels
- Reducing customer interaction costs by providing the customer with self-service tools; reducing the number of phone calls and relieving agents from minor and repetitive problems

Sybase Unwired Platform (SUP) is a mobile business application platform allowing developers to quickly and simply develop applications making the business data available to field employees via any device. Sybase Unwired Platform offers 4GL tools and capabilities of integration with standard programming environments, which ensures fast creation and implementation of applications for a wide range of devices and excellent functions to manage the devices. It is a comprehensive platform that meets all requirements that a company may have for mobile applications. In addition, the platform significantly reduces the total cost of ownership (TCO), since it allows of a strategic approach to the implementation of mobile applications.

- **SUP facilitates seamless integration with many data sources, including databases, web services, SAP applications and others on SOA (Service Oriented Architecture).**
- **SUP enables an easy development of mobile applications for many types of devices, including iPhone, Blackberry, notebooks/tablets with 32-bit Windows and Windows Mobile devices.**
- **SUP is a business programming and implementation solution built on industry-leading Sybase solutions for device management, data security and mobile databases.**
- **SUP reduces the cost of development of mobile solutions by allowing developers to use the existing tools and expertise. The programming platform integrates with popular development environments, including Visual Studio and Eclipse, and contains 4GL programming tools.**
- **SUP is fully integrated with Sybase Afaria that manages devices and ensures security. This allows the management, security and implementation functions, including the data, applications and mobile devices, to be launched from one administration console.**
**Mobile Sales for SAP CRM**

Mobile Sales for SAP CRM provides access to key data collected in CRM by using mobile devices. The application contains ready-made functionalities compatible with SAP CRM. It gives field staff access to CRM functionality needed to work in the field. With the use of mobile CRM, sales professionals gain faster access to information, which shortens the sales cycle.

**Benefits**
- Instant access to CRM data in the field
- Shorter sales cycle
- Access to key CRM functions
- Offline work and periodic data synchronization option

**SAP Field Service**

SAP Field Service gives employees access to relevant information which allows them to reach customers in accordance with the planned schedule, make more service visits at the customers' and reduce the average time of a service visit. Providing appropriate resources, knowledge, customer data and access to the history of previous service incidents, it increases the productivity of field service staff, improves the efficiency of operations and increases the benefits of using SAP CRM.

**Benefits**
- Increased productivity of field service workers
- Optimization of resources
- Instant transfer of information to the field staff
- Offline work and periodic data synchronization option

**Mobile Workflow**

Mobile Workflow accelerates the decision-making process by allowing you to accept applications from a mobile device. The application allows travelling managers to approve business trips, payments and leaves proposed by employees.

**Benefits**
- Shorter decision-making time
- Increased performance of the organization
- Shorter average processing time

**Enterprise Assets Management WorkOrder**

EAM WorkOrder supports fixed asset management. It allows you to access information pertaining to the history and documentation of infrastructure components in the field. It allows you to assign orders and report service visits, as well as to carry out an inventory and update asset information. Having remote access to a spare parts warehouse, a field service technician can check the availability and order an appropriate spare part.

**Benefits**
- Increased efficiency of service and maintenance staff
- Shorter device repair and maintenance cycle
- Access to data from anywhere, reduced number of errors and storage of up-to-date information
- Reduced costs of spare parts storage

**Dedicated mobile solutions**

The SUP platform allows you to create dedicated mobile applications that address the business needs of sales, marketing or service teams.
Partner Channel

SAP CRM provides a comprehensive Web-based tool for managing relationships with sales partners and enables those partners to boost sales efficiency. A personalized portal helps the brand owners manage relationships with business partners and facilitates the cooperation with channel partners (such as distributors, resellers) using all information exchange channels.

An additional advantage of this application is the ability to give channel partners access to the portal, allowing them to obtain the necessary information on the market and in consequence increase sales levels and improve co-operation with end customers.

Selected SAP CRM functionalities supporting the cooperation with channel partners:

- **Business partner management**
  The tool allows of managing the cooperation with channel partners at every stage of the partner life cycle. It also supports winning new business partners, planning and forecasting of sales and revenue in the network, segmentation of partners to better adjust business strategies for reaching the customer, compensation management, managing the development of partner competence, tracking the participation in training courses and gaining certificates.

- **Channel marketing**
  The tool provides partners with the necessary information about the market and supports them in the maintenance of consistent branding, engagement of external partners in common marketing campaigns, management of advertising and motivation funds. The tool is designed to manage the content, catalogs, collaterals, campaigns and leads. It supports incentive programs for partners aiming at the increase of sales of products under their own brand rather than selling competing brands.

- **Partner channel management**
  The tool provides quick access to all information, tools and expert advice for channel partners and internal sales persons. It also provides full access to all sales processes in individual channels and allows of customer database and contact database management, activity management and opportunity management, deal registration, and graphical representation of forecasts. Keeping track of the information about the demand from all distribution channels allows you to create more accurate forecasts.

- **Partner order management**
  The tool optimizes the partner ordering process and collaborative selling within an organization. It comprehensively shows the complete channel order management process, including offer management, direct sales, pricing and contract management, point of sale (POS) and inventory management. It gives end customers a possibility to order products and services across the whole distribution and support network.

- **Channel service**
  It covers the entire range of partner service processes, including knowledge management, service resource planning, service order management, online partner support, warranty management, and complaints and returns management. By providing partners with access to the tools and knowledge contained in the system, the customer service is coherent and the services are always delivered on time.

Analytics

In response to growing customer requirements for the processing of data generated in the CRM module, SAP offers a full range of data analysis tools. Now a report recipient can get a broader view of the data collected in the CRM module and combine it with information from other company areas. Available reporting tools:

- Interactive reports featuring easy and fast installation of applications. The system offers dozens of predefined reports, but also allows you to create your own reports based on the data from CRM.
- Data mining by using the BEx (Business Explorer) package with SAP Business Warehouse. In BI Content, a predefined set of analytical solutions provided by SAP along with SAP BW, there are data sources, data models and queries dedicated to the information gathered in the CRM module.
- BusinessObjects - the ability to create dashboards in SAP Crystal Reports Dashboard Designer (Xcelsius).

Since CRM 7.0 Ehps, formatted reports created in Crystal Reports and ad-hoc reporting in Web Intelligence were added.

Sample analytical reports in selected areas:

- **Marketing**
  - Understanding of the effectiveness of marketing activities, evaluation of effectiveness for different activities, individual channels and tactics.
  - Use of advanced analytical algorithms for the collection, classification and segmentation of the customer base.
  - Predicting customer behaviors, anticipating customer needs and creating more relevant, targeted messages to customers.

- **Sales**
  - Monitoring the overall efficiency of the ongoing business activities by creating accurate forecasts.
  - Proactive tracking of the efficiency of presales activities, budget management and proper resource allocation to achieve the income objectives.

- **Service**
  - Identification of problems and bottlenecks and ability to plan and take appropriate corrective actions.
  - Consolidated information on a specific service event, derived from various sources.

Each implementation of SAP CRM includes the implementation of Business Warehouse.
Implementation of SAP CRM in the Impel Group

Impel is a leading provider of services for institutions and enterprises. Its portfolio includes a wide range of services, including security (monitoring, physical security, cash handling, personnel administration, delivery management) and cleaning services. The list of its activities is constantly growing to include e.g. building or aircraft cleaning. Impel supports more than 4000 companies in Poland and abroad in Latvia and Ukraine. It employs and cooperates with more than 56,000 people. Since 2003, the Impel Group has been listed on the Warsaw Stock Exchange. The revenue for 2010 totaled to PLN 1.44 billion.

Implementation of CRM in the Impel Group

The implementation of an integrated information system in the Impel Group was one of the largest SAP implementations in Europe in recent years. The implementation covered the ERP system, CRM and BW. The whole system is used by over 2000 users. Eighty-nine consultants and 259 other people took part in the implementation project, including 16 team leaders, 5 area managers and 2 project managers. The implementation of the SAP CRM itself was among the largest in Europe. SAP CRM is used by over 500 users in sales, operations and customer service departments as well as by invoice clerks.

Why was the implementation of SAP CRM in the Impel Group unique?

- One consistent SAP CRM system for many companies
  Initially, the implementation of CRM covered 22 companies of the Impel Group. Then more companies were added. In total, SAP CRM is used by over 40 companies. The companies deal with a variety of product lines, including security, monitoring, cleaning and laundry services, even though the sales, service and customer service processes were unified. The Impel Group has a consistent information system across the group.
- Use of a broad range of functionalities
  The functional scope of SAP CRM in Impel covered a large part of the functionality offered by the system: sales (including business partners, activities, opportunities, offers, contracts, sales orders, prices), service (including service orders, contracts, complaints, SLA, installations), selected elements of marketing (segmentation, surveys) and integration with SAP ERP. In addition to standard system access, access through WebClient and WebChannel for e-service was enabled.
- Integration with the majority of SAP ERP modules
  The integration of SAP CRM with SAP ERP included the following modules: SD (Sales and Distribution), MM (Materials Management), PM (Plant Maintenance), RE (Real-Estate Management), HR (Human Resources), and CO (Controlling). The integration was performed on the level of such data as customers, products, employees and equipment with functional locations, controlling orders, as well as for sales orders, service orders, maintenance notifications and contracts. This type of integration was carried out not only from the technical aspect, but also from the business aspect, which is a real challenge with so many companies and areas.

First upgrade of SAP CRM 5.0 to SAP CRM 7.0 in Poland

The consultants from SI-Consulting conducted the first upgrade of the SAP CRM 5.0 to version 7.0 in Poland. The go-live took place on July 16, 2012. The project included the use of functionalities that had emerged or had been enhanced with a new version of SAP CRM (including integration with MS Outlook, IT management according to ITIL). These functionalities will greatly streamline the ongoing processes. In addition, the changes resulting from the rapid development of the Impel Group companies were taken into account.
Implementation of SAP CRM in NextiraOne

NextiraOne is Europe’s leading vendor and expert in communications solutions and services, which serves more than 60,000 customers, providing direct sales and support services in 17 European countries. It designs, installs, maintains and supports communications solutions for businesses, from voice, data and video transmission to mobility, security and applications. Now, SAP CRM is used in two European countries: France and Germany. The solution includes almost all business processes, including CRM. The project gathered dozens of professionals in various SAP and business fields from Poland, France and Germany with the aim to extend the existing business processes, as well as to extend and optimize the SAP CRM functionality and prepare for the rollout in more European countries. The consultants from SI-Consulting were engaged as experts in all subprojects related to SAP CRM and integration with external systems.

The project included:

- Sales process management
- Implementation project management
- Planning, optimizing and reporting of employee tasks within sales and service
- Recording of customer requests in the Customer Interaction Center
- Further management of requests by employees with automatic request monitoring as set forth in the SLA
- Human resources management with the integration with MS Outlook and short text messages to better support the activities of field technicians
- Management of the internal Help Desk

Implementation of SAP CRM and integration with external systems.

Now, SAP CRM is used in two European countries: France and Germany. The solution includes almost all transmission to mobility, security and applications.

The implementation simplified and aligned the communication infrastructure between the SAP system and the customer systems. The fact that the mechanism was based on the SolveDirect platform accelerated the integration with customer systems and eliminated the need to make changes in the SAP system. In addition, the use of SolveDirect allowed of providing customers with an individually customized Web portal available within SolveDirect for creating and tracking service requests.

The project included:

- Customer Interaction Center
- Implementation of Solution Manager
- Integration with SolveDirect

The time of serving the customer within the Contact Center (CC), primarily the receipt of a request by the agent and its transfer to the service – is an extremely important aspect influencing satisfaction of the customer to which the company provides services. During the optimization and implementation of new SAP CRM functionalities in NextiraOne, special attention was paid to streamlining the work and raising efficiency of the Contact Center agents using the Interaction Center WebClient tool. With the flexibility of this tool, it was possible to meet a lot of user expectations for the way of creating requests and presenting customer information and transactional data assigned to the customer. Additionally, the information retrieval was accelerated in the CC through the use of the TREX indexing and search mechanism. As a result of the optimization, the number of existing bottlenecks in the CC agent work was limited – the average time of request creation in the system was significantly accelerated and agent’s access to all information needed at the right time while completing subsequent process steps was improved.

In order to improve the change management process in SAP systems, the service solution was implemented at NextiraOne using the SAP Solution Manager. The project included the implementation of service request management, change management and development project management based on the ITIL methodology. These processes were integrated with the transport management system for each of the supported SAP systems (CRM, ECC, BW, XI, Solution Manager). With the integration of the transport system, change management was improved both at the level of individual service request and the entire project and system release. As a result of the implementation, one consistent tool was made available for managing service requests, changes and transports. This allowed of abandoning previously used additional change management tools and improved the communication between all project participants. The implementation of Solution Manager improved transport management process, reduced change implementation time and reduced the number of errors occurring during the implementation.

In order to expand the range of services, NextiraOne decided to provide its customers with the possibility of a relatively simple integration of customer service systems with the SAP system that supports service requests at NextiraOne. To do this, the SolveDirect platform was used as an intermediate layer between the SAP system and the customer systems, where SolveDirect is a platform designed especially for the integration of service systems. The implementation included the integration of SAP CRM with SolveDirect through SAP XI and SOAP. As part of the implementation, a uniform standard of service request and supported messages was defined, and full integration between the CRM system and SolveDirect was provided. The mechanism’s flexible adjustment to different needs and different customer systems was provided at the SolveDirect platform level. The implementation simplified and aligned the communication infrastructure between the SAP system and the customer systems. The fact that the mechanism was based on the SolveDirect platform accelerated the integration with customer systems and eliminated the need to make changes in the SAP system. In addition, the use of SolveDirect allowed of providing customers with an individually customized Web portal available within SolveDirect for creating and tracking service requests.
SI-Consulting S.A.

We implement SAP by sharing the knowledge and experience www.si-consulting.pl

We specialize in the implementation of enterprise management solutions based on the SAP application family. We have been operating in the Polish market since August 2006, but our experience dates back to the beginnings of the SAP system in Poland — the end of the 1990’s.

Providing IT solutions for business is our priority. While designing the systems and carrying out implementation projects, we focus on customer requirements, making every effort to ensure that our implementation projects are successful for both parties. We strive to build lasting business relationships through professional and responsible approach to customer needs. In this way, we are perceived as a reliable partner. We guarantee the highest quality and reliability of our implementations.

The power of SI-Consulting S.A. is the team of consultants that have a proven track record and who have been well-known to the customers for many years. They completed many successful implementation projects, confirmed by references and relationships with customers. At the moment, the consulting team consists of more than 50 people, of which more than one-third can boast over 10-year professional experience gained during SAP projects. In addition, we cooperate on an ongoing basis with various partners and SAP on implementation projects in Poland and abroad.

The company’s management comprises people who are well-known and highly valued in the market of SAP consulting services and who have over 10-year project experience in implementing these systems.

The changing requirements of the IT market, the wider range of IT solutions and the new business needs of our customers’ all represent a challenge in navigating the development of our services. We are prepared for it. Some of our resources are always future-focused, so we don’t act routinely and are open to new needs. Opinions confirming our open-mindedness to new ideas are the highest praise for us and our best reference.

We have a SAP Gold Partner status, and we are the winners of the Business Fair Play and Quality International - Highest Quality Services programs.

SAP CRM only with SI-Consulting

- The biggest implementation of SAP CRM in Central and Eastern Europe (the Impel Group)
- The first implementation of Webclient in Poland
- The largest SAP CRM implementation team
- Consultants with over 10-year experience in conducting projects
- The first upgrade of SAP CRM 5.0 to SAP CRM 7.0
- The largest number of SAP CRM certificates in Poland
- More than 300,000 hours of consulting at customers’ locations

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