



# Customer Relationship Management (CRM)

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# About the Presenter

- Rob Lepanto has been working with the Oracle Apps for over 10 years, with a focus on customer-facing applications.
- Rob has performed exhaustive reviews of the CRM software offered by Oracle, Siebel, PeopleSoft, and SAP and has worked with clients on package selection for CRM solutions.
- Rob is a Partner at AppCentric, a high-quality ERP consulting company based in Manhattan.
- Rob is the President of the NYC-OAUG

# What is CRM?

- An integrated, comprehensive process providing an organization with information about its customers, enabling it to provide the right products and services to the right customers at the right time, at the right price, while providing the right level of quality.

# What are the Benefits of CRM?

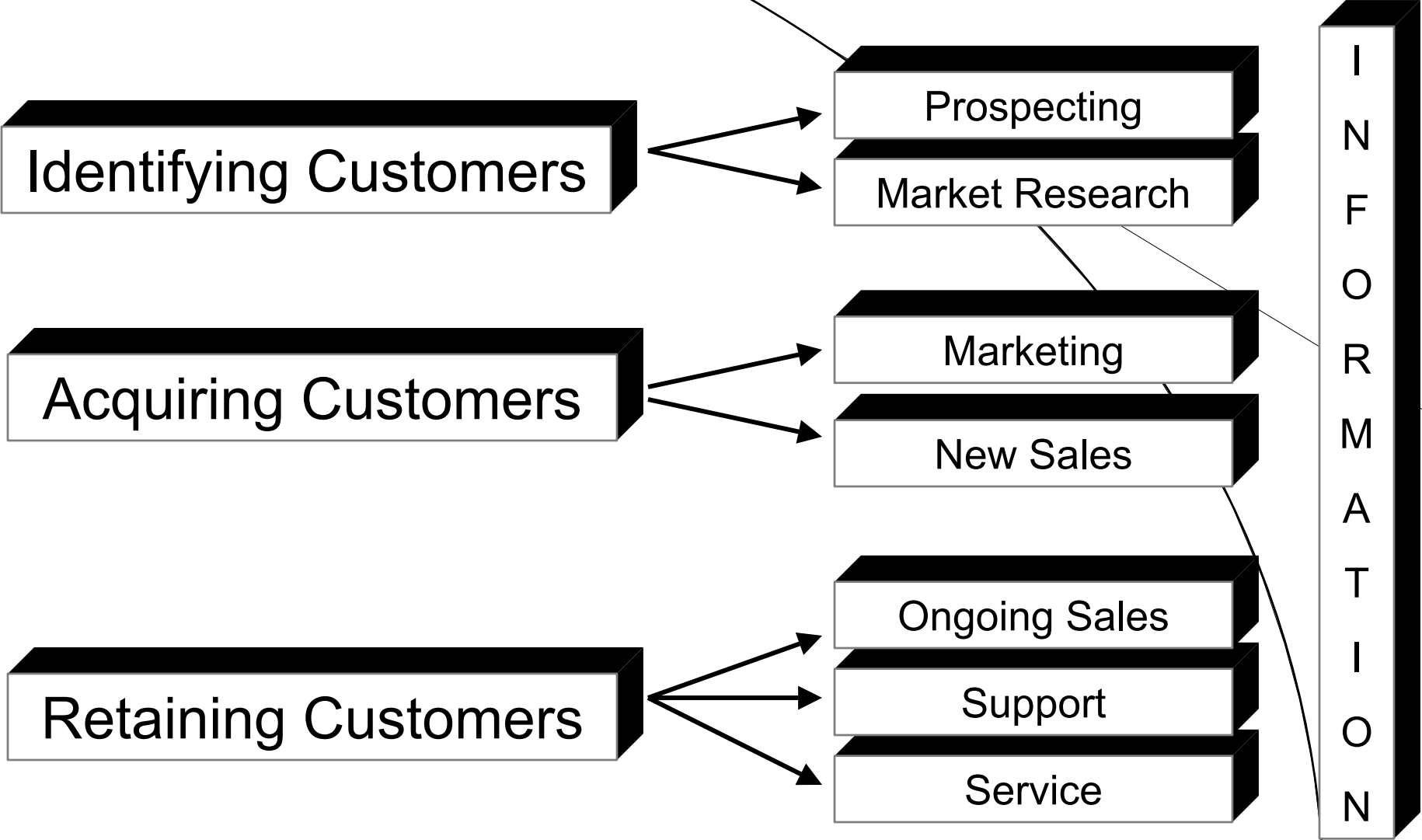
*Potential*

- The potential benefits include:
  - Increased sales
  - Increased customer retention
  - More profitable customer relationships
  - Decreased operating costs
  - Increased margins
  - Increased shareholder value

# The goal of this presentation

- To provide the audience with a brief, conceptual framework for CRM and an introduction to the Oracle CRM suite.
- To provide the audience with information that will help them determine whether they would like to learn more about how CRM could benefit their organization.
- To determine if there is interest in more focused, training-oriented sessions on CRM sponsored by the NYC-OAUG.

# Components of CRM



# Using Systems to Support CRM

- Early CRM focused on automation
- Current CRM focuses on
  - Automation, but also:
  - Information
  - Alignment
  - Collaboration
  - Effectiveness

# Information

- Identifying, capturing, and recalling information about the customer is the basis for understanding how to interact, work with, and support that customer



# Alignment

- Ensures that groups within an organization work together to support corporate objectives through better communication, consistent information, and objectives.

# Collaboration

- Enables coordinated selling, service, and support across channels, business units, and departments through integrated processes and shared information.

# Effectiveness

- Driving enterprise information and enterprise-wide business processes throughout all phases of the sales and service process.

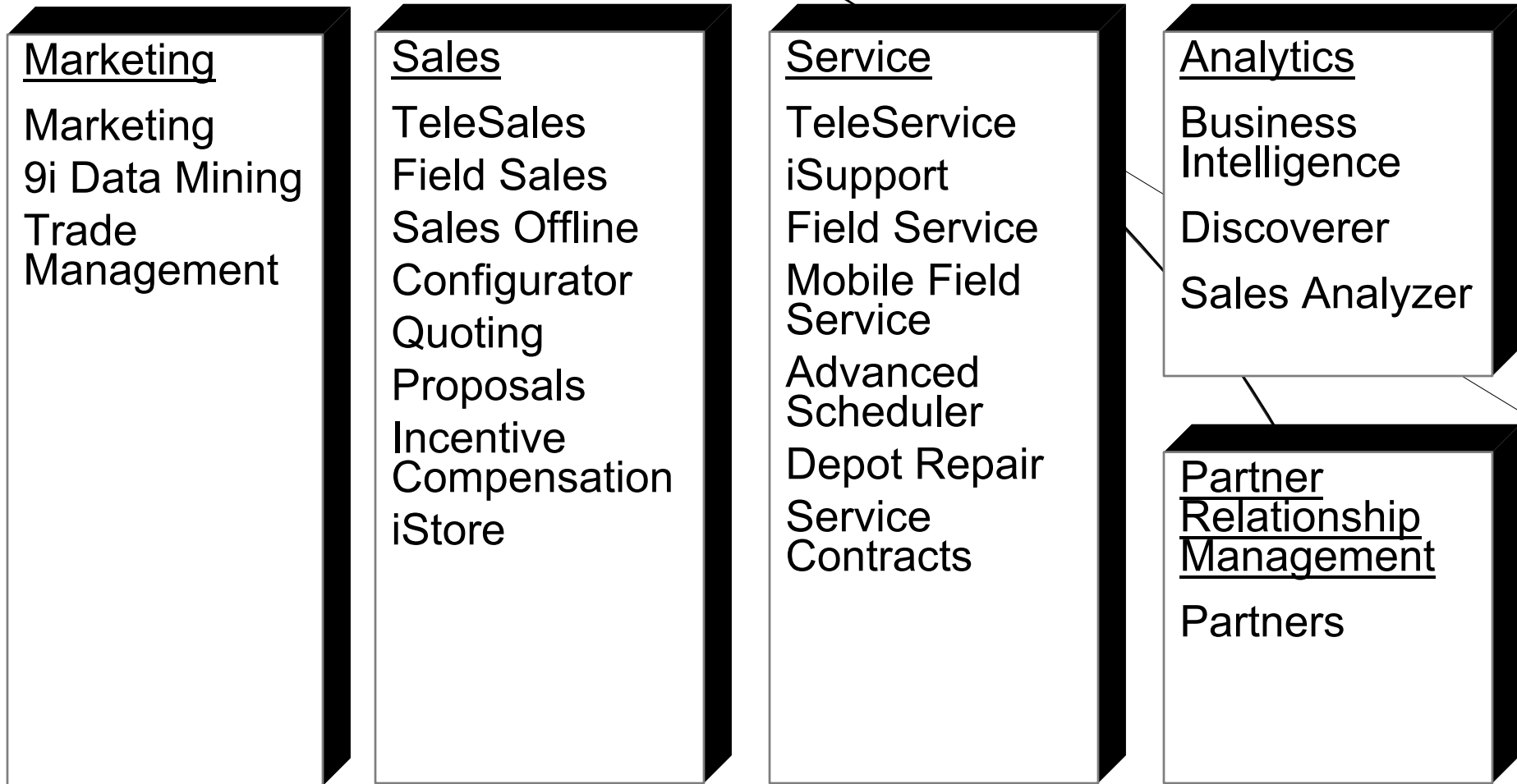
# Some Influential Factors

- Cost of acquiring new customers is higher than the cost of retaining current customers.
- Indirect channels are accounting for an increasing percentage of total sales volume.
- Outsourcing and Offshoring, while potentially creating significant cost-savings, are physically and logistically dividing organizations and are increasingly separating customers with customer service organizations, in terms of time, location, and culture.

# Oracle's CRM Offering

- Oracle Marketing
- Oracle Sales
- Oracle Service
- Oracle Partner Relationship Management
- Analytics

# Oracle's CRM Offering



# Oracle Marketing

## Marketing

Marketing

9i Data Mining

Trade  
Management

- Campaign Planning and Execution
- Analysis and Reporting
- Segmentation and List Management
- E-Merchandising
- Budget and Cost Management
- Promotion Management
- Production Creation and Maintenance
- Pricing Management
- Deliverable and Message Management
- Event Logistics Management
- Response Management
- Leads Management
- Marketing to Partners

# Oracle Sales

## Sales

TeleSales

Field Sales

Sales Offline

Configurator

Quoting

Proposals

Incentive

Compensation

iStore

- TeleSales
- Field Sales
- Sales Offline
- Configurator
- Quoting
- Proposals
- Incentive Compensation
- iStore



# Oracle Service

## Service

TeleService

iSupport

Field Service

Mobile Field  
Service

Advanced  
Scheduler

Depot Repair

Service  
Contracts

- TeleService
- iSupport
- Field Service
- Mobile Field Service
- Advanced Scheduler
- Depot Repair
- Service Contracts

# Oracle Analytics

## Analytics

Business  
Intelligence

Discoverer

Sales Analyzer

- Complex and comprehensive tools
- Needed for 'complete' understanding of customers and management of customer relationships.
- Best of breed software

# Oracle Partner Relationship Mgmt

Partner  
Relationship  
Management

Partners

- Work collaboratively with distribution channel partners
- Allows companies to register, profile, and manage channel partners

# In Summary

- Oracle's CRM offering is substantial. It is also somewhat complicated because it is comprised of so much functionality.
- Integration with the rest of the ERP suite is one of its major advantages.
- The goal of this presentation was to provide you with some basic information on CRM to determine whether this will be an important topic for future meetings.

# For more information

- If you want to learn more about CRM, including either more detailed presentations on the various modules or training sessions for individual modules, please indicate this on the NYC-OAUG survey that you have received.
- Due to time constraints, questions will be handled via email or over the phone.
- If you would like to speak to me directly about this presentation or any NYC-OAUG issues, please either call me (Rob Lepanto) at 212.724.3502 or email me at [rlepanto@appcentric.com](mailto:rlepanto@appcentric.com).