Customer Relationship Management (CRM)

Rob Lepanto, AppCentric
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

Identifying Customers

Acquiring Customers

Retaining Customers

Prospecting

Market Research

Marketing

New Sales

Ongoing Sales

Support

Service

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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

Marketing
9i Data Mining
Trade Management

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

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

Analytics
Business Intelligence
Discoverer
Sales Analyzer

Partner Relationship Management
Partners
Oracle Marketing

- 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

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Oracle Service

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

- Complex and comprehensive tools
- Needed for ‘complete’ understanding of customers and management of customer relationships.
- Best of breed software
Oracle Partner Relationship Mgmt

- 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.