



## Beyond CRM: Making xRM work in an Organization



### Abstract

Customer Relationship Management (CRM) is the process of managing customers. CRM software helps businesses to streamline, organize, standardize, automate, and harmonize sales, marketing, and service-related processes. Today's digital economy demands flexibility and extensibility beyond the scope of basic CRM. This paper focuses on a framework known as xRM which extends the scope and applicability of CRM in delivering better and long-term benefits for an organization.

## Summary

In a Digital economy, the best way for an enterprise to build strategic advantage over competitors is to connect better with their stakeholders. These include not just customers but also employees, suppliers, partners, vendors, and global users. In such a scenario, businesses have tended to implement multiple disparate Line-Of-Business (LOB) packages resulting in an increase in complexity requiring massive integration and huge budgets to operate and run these systems.

The way forward is to address all these issues and challenges with a flexible and extensible application framework. A single solution that offers express application development, consolidated systems management, multi-language support, ease of deployment, simpler user interface, high degree of flexibility, and lower total cost of ownership will help the organizations to manage these factors effectively.

An xRM (Extended Relationship Management) solution is a truly extensible, flexible solution and caters to all the above needs. It connects multiple business aspects together, and is available for office users, as well as users on the go. This document intends to make the xRM identification and qualification process well informed, fast, and easy for organizations looking to achieve scalable long-term business impacts and benefits.

## Challenges faced by the organizations today

The biggest challenge faced by organizations today is making accurate information available to stakeholders in real time across a plethora of channels and devices, and seamlessly orchestrating back-end systems to achieve this goal. Some of the commonly faced challenges by organizations are given below:

- **Automation of business processes**

Organizations have complex and non-automated business processes which are prone to errors and require continuous monitoring. This leads to higher cost, inefficiency, and poor workforce utilization

- **Availability of cohesive information**

It is very essential to place Information and Analytics in context together, to enable employees make well-informed decisions. Absence of a holistic view could result in poor decision-making and adversely affect customer service

- **Connecting back-end systems**

Organizations use various systems for managing disparate functions. Effective communication among these systems is critical for an organization's success. Poor linkage between the back-end systems leads to inconsistency, redundancy, hampers productivity of employees, and

ineffective tracking of issues

- **Go mobile**

Mobile access is an indispensable requirement for those organizations where timely update of information is crucial. It helps organizations to gain the edge over competition, and enhance the productivity of employees by converting their mobile devices into valuable business tools

- **Offline capability for employees**

There are many scenarios like airplanes, remote areas, industrial manufacturing, healthcare, etc, where wireless connections are either forbidden or of poor quality. Employee productivity and customer service are adversely

affected in the absence of an offline access in such environments

- **Social collaboration**

Blending social media with applications enables organizations to connect more effectively with their stakeholders. It helps in harnessing connections, building mutually rewarding relationships, gaining visibility, and fostering loyalty

These challenges faced by organizations can be addressed easily with an xRM solution, which has a number of features that help the organization connect better with its internal and external consumers to offer better brand image and stronger bonds with its audiences.

## Features and Benefits of xRM

Businesses need their data to be always available and accessible instantly. The xRM framework is flexible and scalable which would help in meeting the dynamic business needs. Besides enhancing collaboration across units, xRM facilitates reduction of complex tasks to a few clicks. There are several features available in xRM which are of great value to the end-users, some of which are as follows:

- **Ease of use**  
The UI of xRM is simple and intuitive. It helps in reducing the training time of the users and improving their productivity
- **Business Process Automation**  
In order to facilitate automation, the capabilities of xRM can be leveraged to create custom connections between disparate functionalities. This would result in streamlined operations to drive a more consistent business execution
- **Business Analytics**  
Business analytics are used as an input by the Senior Management Department or unit heads for e.g., to take major decisions, especially those related to strategy formulation. xRM capabilities like real-time dashboards, tailored reports, charts, and drill down features would help them in gaining deeper insights. The results achieved due to implementation of these capabilities can also be tracked easily and evaluated using xRM's inbuilt feature called 'Goals Management'. xRM's integration with Microsoft Office tools would further assist the users to perform self-service BI
- **360° perspective**  
The 360° perspective empowers users by providing them cohesive information, and help in taking key decisions accordingly
- **Notifications and Alerts Generation**  
The performance of business processes can be enhanced by further leveraging xRM's feature of sending notifications and generating alerts..
- **Integration with Back-end Systems**  
xRM can be seamlessly integrated with back-end systems resulting in interoperability, which helps the organizations to leverage their investments in those systems. It provides a single repository of data, making all information accessible at one place, and enabling the employees in effective decision-making
- **Social Integration**  
The social capabilities of an organization can be enhanced by integrating xRM with Yammer, Facebook, Twitter, Lync, and Skype. It results in effective enterprise social networking and enables the users to collaborate/call/interact in real time
- **Mobile Access**  
xRM has the ability to provide mobile access to the users using smartphones or tablets. It offers high device flexibility as it can be run on multiple web browsers. The CRM application further empowers the users by bringing Activity Feeds to their mobile devices and enabling them to perform high-value tasks
- **Offline Access**  
xRM provides offline capability to the users by integrating it with Microsoft Outlook. It allows the users to select the filter criteria for bringing the information into Outlook and copies a subset of xRM database to the local machine enabling them to perform almost all the functions as and when they are online
- **Auditing**  
xRM supports auditing capability where data changes can be recorded over time. The ability of the users to view the audit history can also be restricted. Organizations can track changes made to the business data for future analysis, record keeping, and security purposes

With the above considerations and understanding of an xRM solution, businesses can understand the challenges it needs to address, and the benefits it brings to the organization.

The next step -- to qualify the solution and decide that xRM is a fit to the organization -- is most critical. This means that organizations should know the important parameters that need to be understood well in order to make the implementation of xRM a success, resulting in better achievement of business objectives and goals going forward.

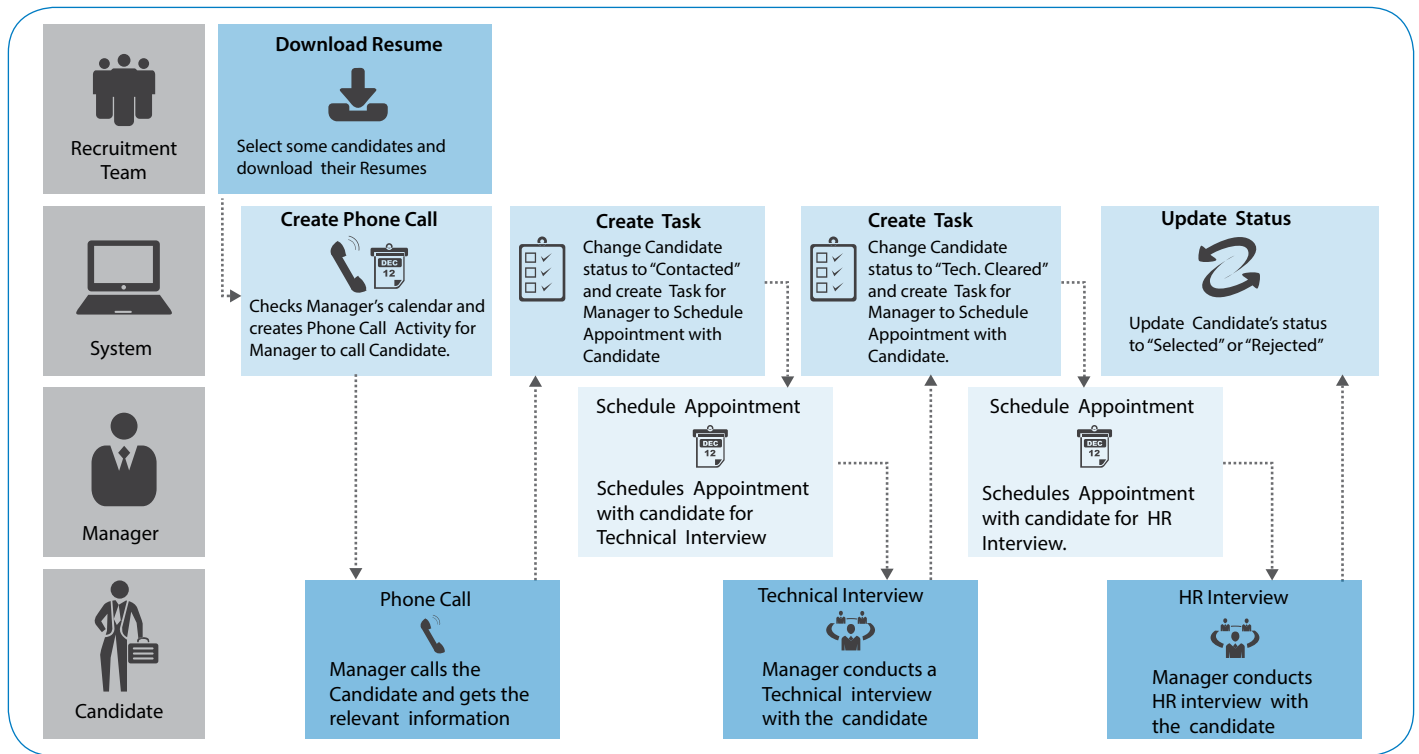
Let us consider a few examples which leverage the features of xRM.

### Recruitment Management

The entire recruitment process from

scheduling and managing the interviews through to shortlisting, final assessment

to selection can be streamlined using xRM framework as shown in the below diagram.

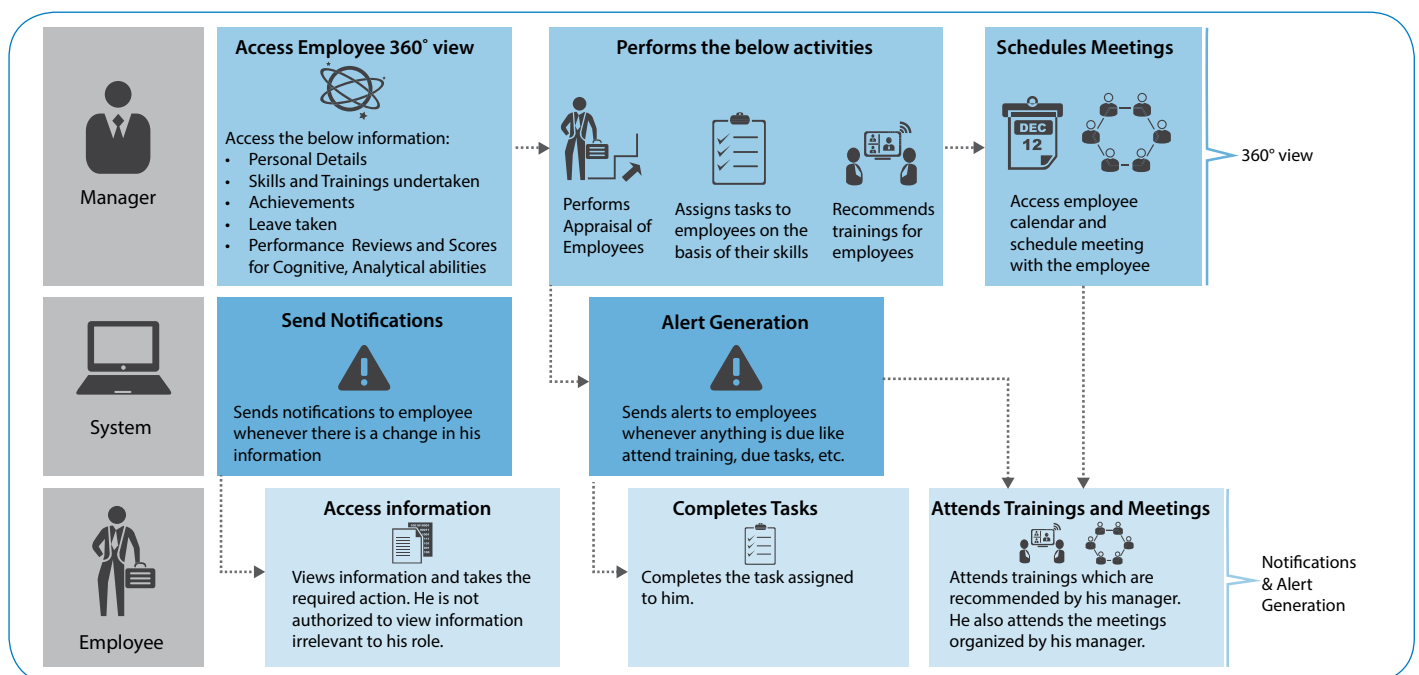


### Employee Management

xRM framework would be used for creating a 360° employee view which would provide a holistic view of the employee. This can be used by the managers for mapping task assignment with employee

skills, training, recommendations, and appraisal. Employees would receive notifications if there is any change in their information like qualification, skills, training, leave approval or rejection, etc.

Alerts are generated if there is any action item for employees like attending training, completion of survey(s), etc. Please refer the below diagram.

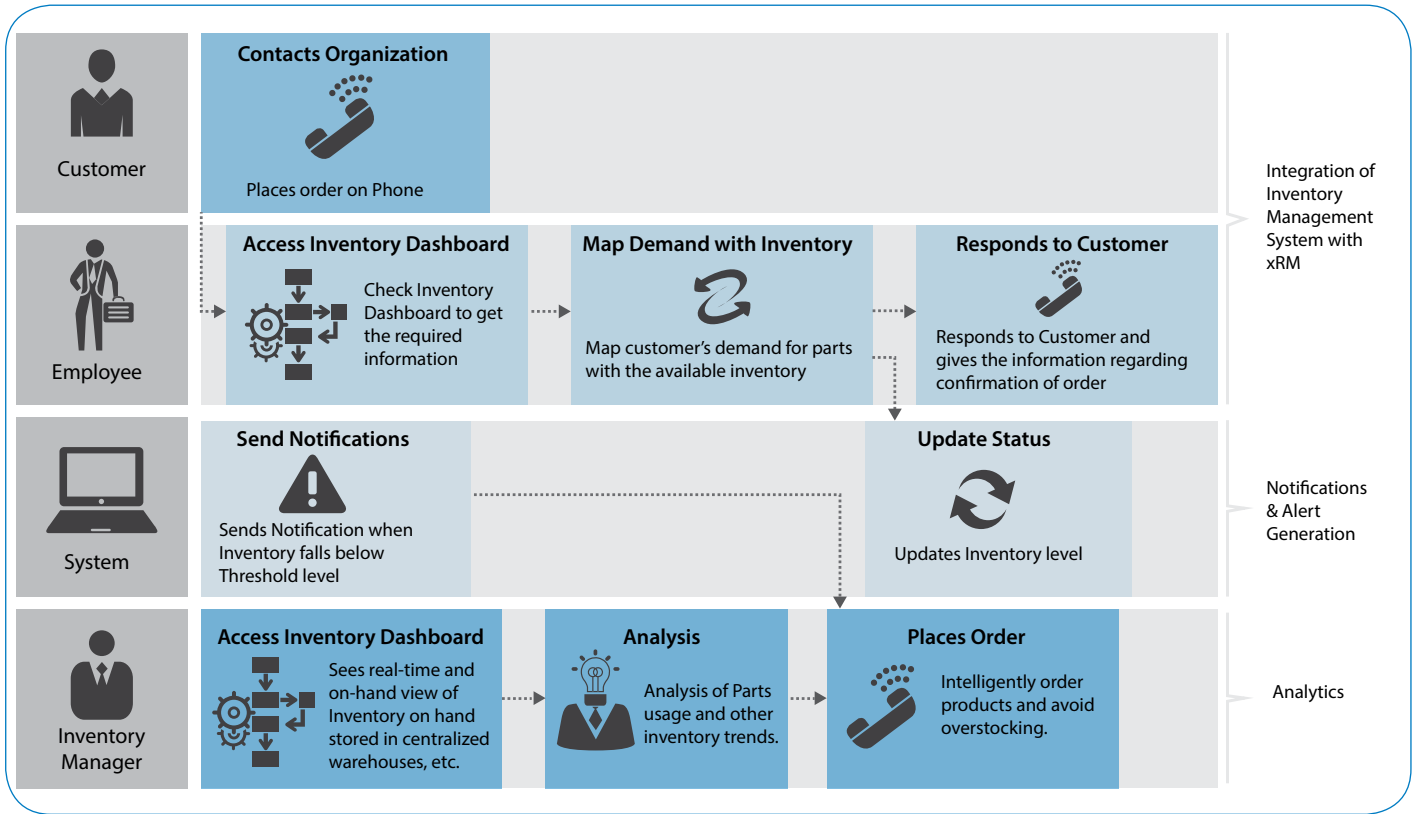


## Enhance Inventory Management

xRM can be integrated with the Inventory Management system to provide real-time view of on-hand inventory stored in centralized warehouses, district offices, or rolling out in trucks. When a sales

representative receives a call from the customer for placing an order, he gives correct information easily and quickly, and inventory numbers are automatically updated when the order is fulfilled. xRM

framework can also be utilized by Inventory Managers for analysis of Parts usage and other inventory trends. These would be used for intelligently placing the orders to avoid overstocking. Please refer the below diagram.



## Measuring xRM applicability

After identifying the relevance of an xRM solution to the organization, a detailed check can be performed on the following parameters which will help in qualification of the solution to a well-informed decision.

- **Level of Customization required**

It is important to determine the level of customization required as there is a limit to the amount of customization that can be done. Also, performance is impacted due to the following factors:

- Lot of customizations
- Very high number of data fields and presence of too many scripts
- Very high complexity and number of visualizations in the dashboard

- **Budget parameters**

Budgeting must assist organizations to decide whether to go ahead with the implementation of enterprise-wide solutions. The associated costs for xRM are given below:

- Software licensing and maintenance costs
- Hardware purchases and maintenance costs
- Software integration and customization including design, development, and testing costs
- Ongoing administration and support labor costs
- User training costs

- **Cost considerations**

The cost also depends on the following factors:

- **Pre-existence of Microsoft CRM environment:** If Microsoft CRM is being used by the organization for a business process, it would be economical to extend it using xRM for another business process. In this case, the training costs can also be reduced
- **Customization:** If the required customizations can be achieved through standard xRM 'out of the box' functionalities, standard workflows, and security roles, the cost can be reduced
- **Integration with a 3<sup>rd</sup> party system:** If the business process requires integration with any 3<sup>rd</sup> party system, xRM will be helpful to manage the high costs

- **Cost Savings**

Cost benefits associated with the implementation of xRM are as given below:

- IT resources can be shared in multiple xRM applications as xRM is built on standard infrastructure
- Hardware Resources can also be shared due to the multi-tenant architecture of xRM

- Many xRM applications can be built under a single license resulting in economies of scale

Once the people and units which are likely to be benefited by the implementation of xRM are identified, the monetary value of the benefits can be determined which would typically come in two forms:

- Reduction in cost due to increased efficiency
- Improvement in Revenue

The ROI would help the organization to take the final call.

- **Localization and Languages supported**

It is crucial to determine the languages in which the UI is to be localized. Currently, 41 languages are supported in xRM and it also permits the creation of custom translations for the custom fields

- **Data Management**

Data Migration can be done either using the inbuilt Import Data Wizard feature or with BizTalk, SSIS, or with the likes of Direct CRM Web Services Access, depending on the extent of data cleansing, and the degree of data transformation required

## Conclusion

xRM delivers a package of immense features, extensibility, flexibility, and scalability. It enables an organization to be self-sufficient and to analyze complexities and details that make the business successful. However, in order to reap these benefits, the organizations should measure the applicability of xRM by identifying and understanding the parameters highlighted in this document.



## About the Authors

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Sundeep is a Lead consultant with 9+ years of experience including 7+ years in IT Implementation in the Consulting, Project management, Implementation, and Development of Microsoft dynamics suite of products. Sundeep has performed multiple roles including those of an Offshore track lead, trainer, onsite functional lead, and offshore project manager. He has experience in delivering CRM Finance, Production, Trade and logistics, and project management activities over multiple business lines and operational units with strong hands-on experience in full life cycle CRM implementation programs and multi-phased, multi-country rollouts.

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