



INFOSYS PERSPECTIVE

Parameters to understand, identify and qualify xRM framework for an organization

Abstract

Customer Relationship Management (CRM) is a process of managing customers. CRM softwares help businesses to streamline, organize, standardize, automate and harmonize sales, marketing and service related processes. The need of today's competitive market though is to have flexibility and extensibility which can be used for maximizing the value of various relationships beyond the scope of basic Customer Relationship Management. This paper focusses on a framework known as xRM which extends the scope and applicability of CRM and results in better and long term benefits for an organization.



Introduction

Businesses compete in today's rapidly changing market to have a strategic advantage over competitors. The organizations need to manage not just their customers but manage not just employees, suppliers, assets, partners, vendors, global user base and knowledge bases. The result is implementation of multiple disparate line-of-business (LOB) applications and packages which lead to a lot of integration and long term maintenance costs in addition to hiring and training of resources to manage 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 which will help the organizations to manage these factors effectively.

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



Challenges faced by the organizations today

The challenges faced by most of the organizations today are primarily related to how the processes are driven, need to make accurate use of information to take strategic decisions, to manage integrated systems, improve productivity and reduce total cost of ownership and to plan and grow forward in form of social collaboration capabilities of the systems. The commonly faced challenges by the organizations are as follows:

a) Manual business processes

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

b) Absence of cohesive information

It is very essential to place Information and analytics in context, together to enable

employees to make well-informed decisions. Absence of a holistic view could result in poor decision making and adversely affect customer service.

c) Disconnected 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 backend systems leads to inconsistency, redundancy, hampers productivity of employees and ineffective tracking of issues.

d) Offline capability for employees

There are many scenarios like airplanes, remote areas, industrial manufacturing, healthcare etc. where wireless connections are either forbidden or there is no/poor connectivity. Employee productivity and customer service are adversely affected in absence of offline access in such environments.

e) Go mobile

Mobile access is an indispensable requirement of those organizations where timely updating of information is crucial. It helps the organizations in gaining an edge over competition and enhancing the productivity of employees by converting their mobile devices into valuable business tools.

f) 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 by xRM solution easily. There are several features of an xRM solution which lead to great benefits and prove strategically profitable for the organization.

Features and Benefits of xRM

Businesses need their data to be always available and instantly accessible. xRM provides noteworthy improvements in terms of availability and scalability. xRM also enhances collaboration across units and facilitates reduction of completion of tasks to a few clicks. There are several features available in xRM which are of great value to the end-users. Some features and benefits are as follows:

a) Ease of use

The UI of xRM is fast and intuitive and resembles Microsoft Office UI. It helps in reducing the training-time of the users and improving their productivity.

b) 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. Consider the following examples:

i. Recruitment Management

The entire recruitment process from matching the vacancies to candidates, managing the interview process through to shortlisting, final assessment and position fulfillment can be streamlined using xRM framework. Please refer Fig 1.

c) Business Analytics

Business analytics are used as an input by Senior Management e.g. Department or Unit heads 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 easily tracked 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. Consider the following Examples:

i. Formulating HR Strategies:

a. Succession Planning:
Key business metrics can be identified and linked with Employee Assessment parameters like Competencies, Performance, Attitude Surveys,

etc. It would provide the required input for preparation of Employee Scorecard which could further help in creation of Succession Plan for the employee.

ii. Enhance Inventory Management:

Using xRM framework the real time view of organization's inventory can be achieved. Inventory Managers can determine the Parts Usage, other Inventory trends and intelligently place orders to avoid overstocking.

d) 360° perspective

The 360° perspective empowers the users by providing them cohesive information and helping in taking key decisions accordingly. Consider the following examples:

i. Employee 360° view

360° employee view provides a holistic view of the employee. This can be used by the managers for mapping task assignment with employee skills, training recommendations and appraisal. Fig 2 shows the usage of xRM for Employee management

ii. Patient 360° view – Health Care Industry

To facilitate proactive, specialized and individualized patient care, Care team requires a 360° patient view. This encompasses very detailed information like medical history; treatment history etc. about the patient.

e) Notifications and Alerts Generation

The performance of business processes can be enhanced by further leveraging xRM's features of sending Notifications and Alerts generation. Consider the following example:

i. Tracking Employee Information:

Employees 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 attends training, completion of survey(s), etc.

f) 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. Consider the following example:

i. Enhance Inventory Management:

Integration of Inventory Management system with xRM provides real time display 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.

g) Social Integration

The social capabilities of 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.

h) Mobile Access

xRM has the ability to provide mobile access to the users using smart phones 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.

i) 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 when they are online.

j) 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 purpose.

With the above considerations and understanding of xRM solution, businesses can understand the challenges it addresses 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 which 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.

Fig. 3 shows the 'Pain points – Offerings' matrix. The matrix presents a mapped overview of xRM features to the challenges and pain points faced by organizations.

Measuring xRM applicability

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

a) Level of Customization required

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

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

b) Budget parameters

Budgeting needs assist the organizations to decide whether to go ahead with the implementation of enterprise wide solutions.

The associated costs for XRM are given below:

- i. Software licensing and maintenance costs
- ii. Hardware purchases and maintenance costs
- iii. Software integration and customization including design, development and testing costs
- iv. Ongoing administration and support labor costs
- v. User training costs.

c) Cost considerations

The cost also depends on the following factors:

- i. 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 processes. In this case, the training costs would also be reduced
- ii. Customization: If the required customizations can be achieved through standard xRM 'out of the box' functionalities, standard workflows and security roles, the cost would be lesser
- iii. Integration with a 3rd party system: If the business process requires integration with any 3rd party system, xRM will be helpful to manage the high costs

d) Cost Savings

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

- i. IT resources can be shared in multiple xRM applications since xRM is built on standard infrastructure
- ii. Hardware Resources can also be shared due to the multi-tenant architecture of xRM
- iii. 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 2 forms:

- i. Reduction in cost due to increased efficiency
- ii. Improvement in Revenue

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

e) 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.

f) Data Management

Data Migration can be done either by using the inbuilt Import Data Wizard feature or by using BizTalk, SSIS, Direct CRM Web Services Access depending upon the amount of data cleansing required and degree of data transformation.

Summary

xRM makes a business thrive and facilitates better decision making. Every business is unique and has unique needs. A single xRM solution can be tailored to meet all business objectives. xRM enables an organization to be self-sufficient, analyze complexities and details that make the business successful. This perspective document provides an overview of xRM, set of parameters which will help the organization in understanding xRM solution, its benefits and identifying how their needs can be addressed by an xRM solution. Once the identification is completed, this document aids in measuring the applicability and enriching the qualifying process of the same to be a fit for the organization. These parameters will help organizations make a well informed decision and make effective use of the application to achieve significant return on IT investments.

Appendix

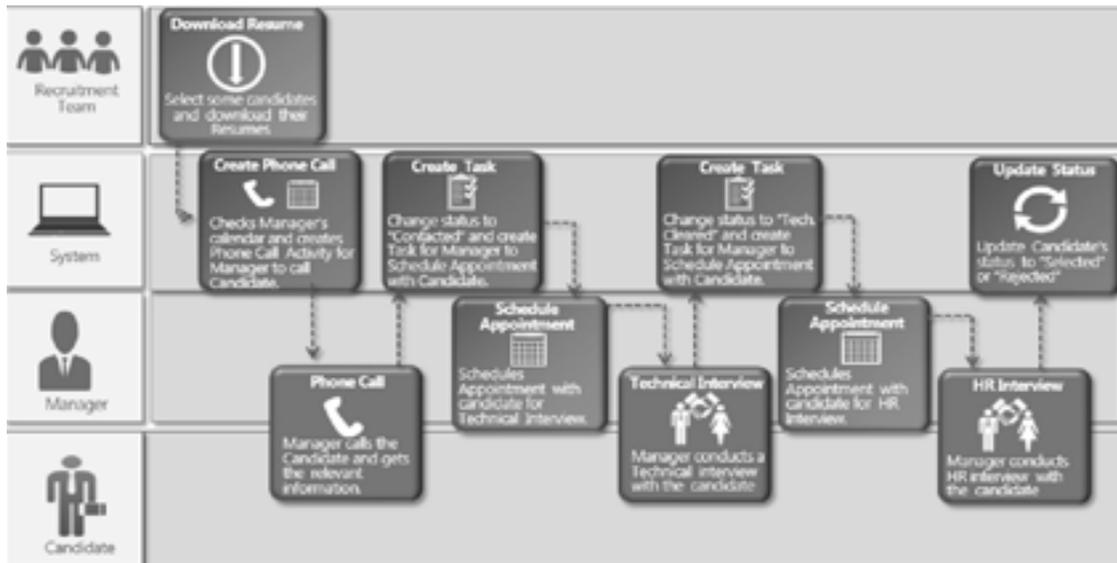


Fig 1: Recruitment Management

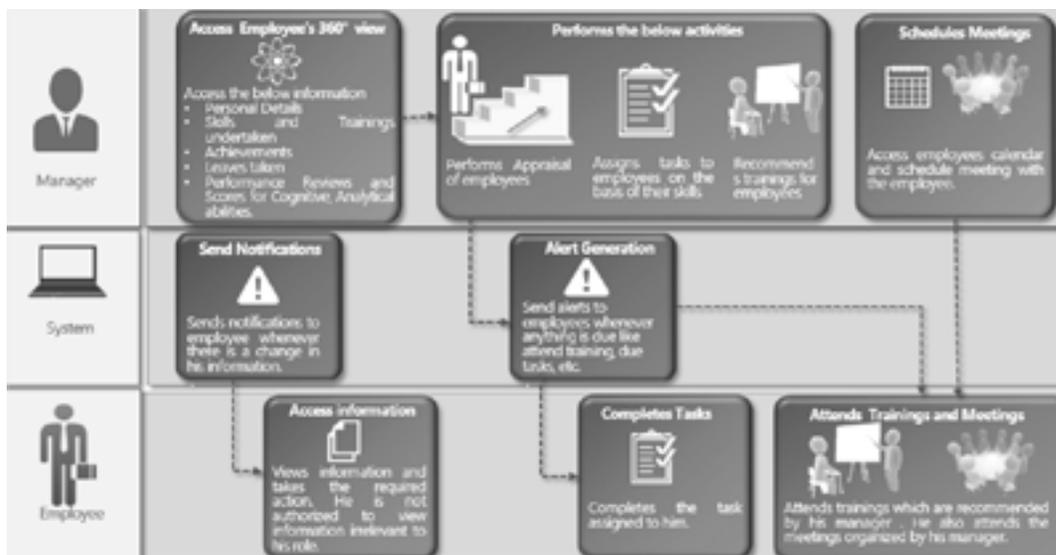


Fig 2: Employee Management

Pain Points	xRM proposition	Key xRM Feature(s)
Manually driven business processes	✓	Business Process Automation (Business process flows)
Disconnected back end systems	✓	Single gateway - Integration with Back end Systems, ERPs
Offline capability for employees	✓	Full Offline access with Microsoft Outlook Client
Go mobile	✓	Mobile Access for Smartphones, Tablets (Android & iOS)
Social collaboration	✓	Social Integration with Yammer, Skype, Lync
Data Traceability	✓	Auditing feature

Fig 4: 'Pain Points-Offering' Matrix

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