



# INFOSYS LEADS AND PROPOSALS SOLUTION FOR PROFESSIONAL SERVICES

## Abstract

The professional services industry runs on human connections and relationships. For this reason, it has been slow to adopt new technologies in contrast with other industries. But what if technology can aid in creating strong networks? What if technology can help figure out the best people for a job? And what if routine operational tasks could be automated to free up time and allow humans to do what they do best – connect with others?

This white paper discusses how Infosys Leads and Proposals Solution does all that and more to enable professional services teams and their leadership to transform business and accelerate growth.

## Introduction

While most businesses in the world have been reshaped in different ways by technology, few have witnessed the radical changes professional service enterprises have been going through.

Typically, in CRM systems, leads are created and converted to either contacts and deals (or opportunities), or junked eventually. When leads are entered in a CRM system, they need to be assigned a score and qualified. This process involves gathering information about the prospect, such as requirements, level of interest, budget, and many other parameters.

Many CRM products today are oriented towards personalized shopping and guided buying. But the professional services industry is driven by its partners and managing directors and through their network of contacts. Marketing has a limited role in this. The professional services industry is dependent primarily on personal connections with customer rather than tools.

Capturing leads and opportunities is a partner community requirement. Currently any information related to a pursuit is managed by email or phone and recorded manually in the system. The partner community does not have the overall view of the pipeline and is therefore unable to forecast sales growth.

Even traditional CRM systems are too complex for partners and managing directors to manage leads and pursuits. While most of their time is spent in customer engagement, the partners and managing directors also need to manage the entire pursuit lifecycle with minimal and essential inputs.

With these challenges in mind, the Infosys Leads and Proposals Solution simplifies and streamlines the processes and fulfilment of professional services requirements for opportunity management.



## Infosys Leads and Proposals Solution

Leads and Proposals Solution is a modular, industry-specific solution developed by Infosys based on SAP's Industry Cloud Portfolio, to deliver business innovation specifically for the professional services industry.

Our Leads and Proposals Solution provides a lean yet intuitive way for partners and managing directors of enterprises to track

leads, convert them to opportunities, and manage the complete pursuit cycle. It provides a holistic view for partners to manage leads originating from various sources and enables them to track status and qualify leads for a formal proposal.

The solution leverages SAP Business Technology Platform (BTP) for designing various user-friendly apps, integrates with

SAP S/4HANA Cloud for professional services, and utilizes SAP Smart Business Services and SAP Analytics for Cloud (SAC) for reporting and analytics. It also leverages intelligent technologies such as predictive analytics (PAL) to forecast the probability of a win and recommend the best-suited employee for a pursuit team, and SAP Conversational AI (CAI) for retrieving information with ease.



### Key Features

- Built on SAP BTP, integrated with SAP S/4HANA Cloud and SAP Analytics Cloud, and leverages intelligent technologies such as predictive analytics (PAL) and SAP Conversational AI (CAI)
- Enables partners and managing directors to track leads, convert them to opportunities, and manage the complete pursuit lifecycle
- A simple and configurable dashboard to gain visibility on leads conversion, new clients, and win/loss ratio, and enable interventions to improve the conversion ratio and revenue growth
- Seamless integration with SAP S/4HANA Cloud to automate project creation, thereby improving flexibility for project managers
- All capabilities are available for new leads and opportunities as well as for scope changes
- The solution is optimized for mobile with the capability to capture leads information when offline. When you connect back to the network, the information is synchronized automatically
- Chatbots and SAP Conversational AI (CAI) to enable partners, principals, and other team members to retrieve information without the need for a separate login
- Surveys to help capture key reasons for win/loss, and provide enterprises the ability to apply the lessons for future leads and improve win probability.
- Leveraging HANA Predictive Analytics (PAL), the solution guides the partners on win probability and recommends employees best suited for the pursuit team

### Infosys-SAP Collaboration to Enable Intelligent Enterprises

To enable enterprises to become intelligent, SAP is expanding its vertical solutions with an ecosystem of industry cloud applications. These solutions complement the existing SAP portfolio to extend the value of joint partner investments. These applications leverage SAP Business Technology Platform (SAP BTP), with advanced technologies, and are interoperable with SAP Business Network and the Intelligent Suite.

SAP's Industry Cloud helps customers across industries to deploy specialized solutions

enabling them to optimize, extend, and transform their core business processes. Customers can discover and deploy these solutions with ease to digitize and automate operations across every part of their business.

Most professional services enterprises use SAP solutions as their core ERP. SAP has partnered with us to leverage our expertise and experience in SAP Industry Cloud offerings, state-of-the-art SAP infrastructure, large resource pool, and a wide range of tools and accelerators developed to

help accelerate transformation projects. With Leads and Proposals Solution, Infosys and SAP have created a robust solution to capture the entire lifecycle of opportunities for professional services clients.

### The Road Ahead

We foresee considerable growth opportunities for professional services firms with our Leads and Proposals Solution. Industry analysts have shown keen interest in this highly specialized but simple and user-friendly application.

## About the Authors



**Nitin Manderwad**

Principal Consultant, SAP Professional Services, Infosys

Nitin is part of the SAP Professional Services practice at Infosys. He has more than 15 years of experience in SAP Green field implementations, roll out, upgrade and support programs. He is the functional lead of Infosys Industry cloud solution for Professional Services.



**Ajay Kumar S**

Industry Principal, SAP Professional Services, Infosys

Ajay is part of the SAP practice at Infosys. He has more than 20 years of experience in SAP Green field implementations, roll out, upgrade and support programs. He is the Industry lead of Infosys Industry cloud solution for Professional Services.



**Sajith**

Project Manager, SAP Professional Services, Infosys

Sajith is part of the SAP Professional Services practice at Infosys. He has more than 12 years of experience in SAP transformations, implementations, roll out, upgrade and support programs. He is leading the Infosys Industry cloud solution for Professional Services.

For more information, contact [askus@infosys.com](mailto:askus@infosys.com)



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