

AUTOMATING CRM PROCESSES

**TaskCentre**<sup>®</sup>

## Enhancing Customer Interaction Management - A Guide to SOA for CRM Professionals



SOA & CRM

# Customer Interaction Management

Delivering the untapped capabilities of your CRM application

### Business Application Enhanced

Customer Relationship Management (CRM)

### Executive Guide Subject

Service-Oriented Architecture for Enhanced Customer Interaction Management

### Business Goals

Increased Profits, Real-Time Fulfilment of Information Requests and Customer Service Level Improvements.

### The knowledge you will gain from this paper:

- ⇒ What customer interaction management is and why it has become such a big issue for CRM professionals
- ⇒ A 'Plain English' overview of Business Process Management (BPM) and Service-Oriented Architectures (SOA)
- ⇒ An insight into the smart approaches many CRM professionals are taking to improve customer interaction management
- ⇒ The importance of Service-Oriented Architecture's to customer interaction management and the role Business Process Management (BPM) solutions have in delivering "self-service" points
- ⇒ The business benefits of BPM, SOA and customer interaction management
- ⇒ How Business Process Management (BPM) solutions maximise up sell/cross sell opportunities.
- ⇒ Where to seek further information on customer interaction management

## Introduction

Information is now the most valuable commodity to both organisations and customers alike. As information consumers we now expect multiple access points to real-time data that meet our situational needs.

Indeed, our continual hunger and expectation for time or situation specific information has been magnified by the explosion in the use of technologies such as the Internet and the rise to prominence of search engines like MSN, Yahoo and of course Google.

To CRM professionals, data has always been a critical factor in achieving corporate goals and the adoption of CRM and BI applications is testimony to this. However, a major problem is now confronting CRM professionals worldwide: Customers are no longer prepared to wait for slow, human-led responses to information requests and, conversely, as corporate data users we are no longer prepared to 'go looking' or 'watch out' for information that is important to us.

For businesses to succeed in today's commercial landscape, they need to develop real-time methods of automatically managing both inbound and outbound interactions with customers and stakeholders. In short, we now need data to be both dynamic and truly accessible; applications that are both event-driven and service-oriented by nature. This will enable organisations to meet the real-time expectations of the information consumer.

This guide seeks to highlight how **Business Process Management (BPM)** solutions are important to CRM professionals seeking to deliver **Service-Oriented Architectures (SOA)** which enable organisations to **manage customer interactions**, with such precision, that significant gains in customer service and revenues can be achieved instantaneously.

## What is Business Process Management (BPM)?

Business Process Management in broad terms is the automation of those employee activities that cost the company valuable time and money. All businesses today are dependent on

people extracting, formatting and distributing information from business applications. Yet, people have physical limitations, they are prone to illness and unfortunately make mistakes.

Business Process Management technology is the IT industry's response to the problems created by employee-dependant applications. Directors, managers, suppliers and customers expect instant responses to real-time commercial interactions and business process management technology leverages all the organisation's I.T. systems by creating a real-time, responsive infrastructure.

## How does BPM work?

Business Process Management Software works by 'loosely coupling' with a company's existing applications which enables it to monitor, extract, format and distribute information to systems and people; in line with business events or rules.

By leveraging the processes and information of existing applications, automated business processes can be configured and re-configured without having to alter the underlying structure of a company's applications. TaskCentre merely uses these applications as information services and workflow trigger points.

Creating or re-creating an automated business process is achieved via any PC on which TaskCentre is installed through its intuitive and logical Graphical User Interface (GUI). This GUI enables an administrator to automate common employee-driven processes, such as creating and sending end-of-week sales reports, by simply dragging and dropping Tools into a sequence that emulates the employee process, i.e. Schedule Tool, ODBC Tool, Run Crystal Tool, and Send SMTP Tool.

## What are the benefits?

Business Process Management Software, as a technology, can deliver endless benefits to any-sized organisation but more importantly these benefits will be unique to your company.

Through automating repetitive employees business processes, such as report creation and distribution or the monitoring of or reporting on company KPI's, TaskCentre reduces your

operational costs and frees-up employees to concentrate on activities that are important to the success of your business.

A small sample of the common business benefits that our customers cite include:

- ⇒ Stronger Revenue Streams
- ⇒ Operational Savings
- ⇒ Reduction in the Administration involved with Compliance and ISO Activities
- ⇒ Greater Company Agility
- ⇒ Higher Customer Satisfaction Levels
- ⇒ Freeing-up of Employee Time
- ⇒ Eradication of Data Entry Errors
- ⇒ Critical Failure Avoidance

More importantly, Business Process Management (BPM) technology is the foundation on which CRM professionals can build their customer-tailored Service-Oriented Architectures (SOA). Without BPM capabilities, CRM applications remain static, user-driven and inaccessible to important customers and stakeholders seeking real-time information.

## What is a Service-Oriented Architecture (SOA)?

A Service-Oriented Architecture (SOA) facilitates the development of modular business services that can easily be re-used by customers and stakeholders, offering organisations a distinct technical advantage that provides significant and highly visible commercial benefits.

By loosely-coupling both internal and external services with existing applications and systems, organisations can build and maintain processes that capture and manage critical information whilst consistently adhering to business logic and rules.

Customers, suppliers, trading partners and important stakeholders will in turn benefit from real-time visibility of and access to 'information services' that would normally reside in information silos.

Providing a service-oriented architecture is a fundamental necessity to managing information without human-involvement and organisations can maximise real-time revenue opportunities that would normally be missed.

## Why is BPM software an important element to creating a SOA?

The TaskCentre BPM Suite is an invaluable tool for implementing a true SOA for two reasons. Firstly, it enables the organisation to integrate multiple applications together by using a simple drag and drop interface. This exposes information to stakeholders enabling timely decisions that deliver lower operational costs and greater agility.

The second benefit of the TaskCentre BPM Suite for implementing an SOA, is that it enables organisations to quickly and easily configure and reconfigure automated, self-service or event-driven information services that address the needs of the organisation's diverse information consumers.

## What is an 'information service'?

An information service is a specific piece of information or data which is important to a given stakeholder, that resides in a given application(s) and that may be presented through any number of communication mechanisms. These mechanisms can include web services, SMS, e-mail, customer web portals or indeed any other compatible technology.

It is through this exposure of specific blocks of information to stakeholders that organisations can significantly enhance customer service, reduce administration costs and enable the organisation to meet the pace of modern commerce.

Illustrations of popular information services:

- ⇒ Alerting and notifications services
- ⇒ Document automation services
- ⇒ Workflow and human interaction
- ⇒ Web services and data integration services
- ⇒ Subscription and request services
- ⇒ Web portal and content management services

## What are the benefits of SOA?

Listed below are just a few benefits that

CRM professionals will gain from a SOA:

- ⇒ Customer-driven, self-service mechanisms
- ⇒ Removal of slow, human-led information fulfilment
- ⇒ Lower operational costs
- ⇒ Greater agility
- ⇒ Perfect visibility of all real-time company and/or customer information
- ⇒ Higher up sell/cross sell ratios

In addition to the common benefits delivered by an SOA, organisations make significant strides in their customer interaction management processes which is widely accepted as the route to successful business growth.

## What is Customer Interaction Management?

Customer Interaction Management is the co-ordination of all the company's external and internal information services so that:

- ⇒ Customers can retrieve information in real-time, through any number of devices and without being required to deal with company employees.
- ⇒ Organisations can seize real-time opportunities that customer interactions present whilst ensuring that each customer passes through a standardised handling process.

Figure A - Customer Interaction Management

### First Stage: Web Enquiry

A potential customer requests a number of specific holiday brochures via the company's web enquiry form.

### Second Stage: Automated Lead Management

The web enquiry generates an inbound e-mail which the BPM engine immediately identifies. The BPM engine then automatically interrogates the CRM database to see if the enquirer is a returning customer or a new prospect. If the enquirer is identified as an existing customer the enquiry will be added to the record history notes and a follow-up

activity for the Call Centre Service Representative (CSR) will be set. Alternatively, if BPM engine identifies that the enquirer is a new prospect a new account record will be created, a follow-up activity will be scheduled and a digital welcome pack will be sent to the prospect.

### Third Stage: Automated Fulfilment

Once the enquiry has been automatically entered in the CRM database by the BPM engine, it will send a notification to the brochure fulfilment department, requesting that the brochure be sent out to the prospect.

A further notification is sent to the enquirer informing them that their request is being fulfilled and will arrive within x number of days. Additional information, such as contact details or a list of the 10 most popular holidays sold this week could be included.

### Fourth Stage: Intelligent Lead Cultivation

From the point that the brochures have been delivered to the enquirer, the BPM engine embarks on the lead cultivation process. For example, the BPM engine may generate and send a number of time-based loyalty discounts or bonus club points to encourage the returning customer to book a holiday. Similarly, for the new prospect, the BPM engine may generate a number of time-based introductory offers to encourage the prospect to book their holiday with the company.

### Fifth Stage: Automated cross-sell

Once a booking confirmation is made and the entry is placed onto the system, the BPM engine will then optimise customer revenue streams by automating a number of cross-sell e-mails or SMS communications. Example cross-sell products may include holiday insurance offers in the instances where the customer did not take up a company policy during the booking procedure, discounted items from affiliate partners such as clothing or technology retailers or indeed something as simple as sun cream.

The five stage example above is a good illustration of how BPM technology significantly enhances the entire customer interaction management process. In the case of the holiday

company, all the repetitive but essential administration was removed from handling the customer enquiry; enabling the CSR's to focus their efforts solely on revenue generating activities. More importantly, each and every customer receives the same consistent level of customer service with enhances the company's reputation.

In addition to streamlining the repetitive CRM processes, BPM technology also provided the CRM manager with the ability to design and execute automated cross-sell campaigns that were triggered by account details, events or indeed business rules. In this instance, the campaigns were triggered by a specific timeframe and where the customer had booked his/her holiday.

Clearly, to achieve this win-win situation through the intelligent customer interaction management process, CRM professionals must seek to create a SOA through adding BPM capabilities to their **existing CRM application**. By taking this approach organisations will achieve the below and more:

- ⇒ Perfect, real-time customer service
- ⇒ Standardisation of customer handling processes
- ⇒ Reduction in none revenue generating inbound telephone calls
- ⇒ Greater customer insight
- ⇒ Maximisation of all cross-sell or cross-sell opportunities
- ⇒ Further ROI from your CRM application
- ⇒ Eradication of slow, costly employee-led administration
- ⇒ Higher customer retention and acquisition levels
- ⇒ Automatic marketing campaign that are triggered by the actual behaviour of your customers/prospects
- ⇒ Event-driven visibility of customer information
- ⇒ Enforcement of company rules and compliance procedures

with the opportunity to improve service levels but company growth and workloads stifle productivity.

By adding Business Process Management (BPM) Software to your CRM application you will be able to significantly enhance the way your customers interact with your company. Specifically, you will be able to automate business process that reduce your operating costs and maximise your revenues. Furthermore, you will be able to offer self-service mechanisms that meet your customers time or location-specific information needs.

If you want to learn more about how BPM technology can help your company enhance customer interactions, through developing a SOA, please contact us or visit our web site to learn more.

## Conclusions

The fact of the matter is that existing CRM applications present the CRM manager and his/her application users

## About the Company | Orbis Software

Orbis Software provides the leading pure-play Business Process Management and Workflow solution, TaskCentre, enabling organisations to drive efficiency and reduce costs through collaborative process automation.

Founded in 1997, Orbis Software Ltd provides a scalable suite of applications to suit any size of organisation. There are more than 4000 organisations around the world already using Orbis products, including such names as Nasdaq, Telstar, BP, BDO Stoy Hayward, GE Capital Equipment, The Rank Group, Salomon Brothers, Zenith, BUPA, Jaguar, Lloyds TSB, and Rolls Royce.

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