

Customer 360 for Sales & Account Planning

Summary

A Fortune 500 industrial supplies company was evaluating technology options to make its national team of more than 8000 account managers, inside sales, retail branch managers and customer support staff more effective.

Business Drivers

The company, long recognized as an industry leader at excellence in customer service, was growing rapidly. As a result, the company was faced with the challenge of being able to continue providing consistent and highly reliable service to its loyal customer base. This required their B2B sales, retail and customer service organizations to have a complete view of the customer. Without such insight and knowledge, the company would be challenged to maintain its edge in a highly fragmented, competitive market. This was a strategic business driver.

At a one tactical level, the sales and account management teams wished to build more accurate annual, quarterly and monthly account (and revenue) plans. They wished to make timely forecasts and plans based on past and current sales trends, identify potential revenue gaps and encourage volume-based rebates and discounts.

Providing rapid and comprehensive sales training was another key tactical driver. The company was adding sales and customer support staff very quickly through the mid- and late- 2000s. But doing so required educating the sales teams about the company's products, services, pricing and sales models effectively and efficiently.

Technology Drivers

The Information Technology team at this company had pioneered the use of data warehousing (SAP BW), CRM (SAP CRM), ERP (SAP ERP), SCM (SAP APO) and portal technology (SAP Enterprise Portal). So it was vital that any solution introduced into this technology landscape could successfully leverage SAP infrastructure. Usability and integration were therefore identified as major obstacles in getting the right information to the user at the right time.

Key challenges

While the company had painstakingly developed several trusted sources of customer information, they were fragmented and not easily accessible to all users.

"Time spent gathering and re-searching customer information is time spent not selling"

Sales users were spending an average of 10-15 hours every week researching and assembling customer information reports. They had to navigate through CRM screens, several SAP BW reports, ERP screens etc to form a 360-degree picture of their accounts. All this manual reporting and planning effort translated directly to less "selling time" for each salesperson. Measured individually and collectively, it was a major productivity loss for the company.

Project objectives

- Visually intuitive harmonization of many data screens, reports and analytics.
- Rapid implementation – 90-day project cycles, from blueprint to deployment.
- Integration with SAP CRM, ERP, BW and non-SAP data sources.
- View Customer 360 in context - ability to launch the application from within SAP CRM 7.0 account management screen.
- Simplified account planning – empower users to build account plans by providing one-click access to all information about their accounts.
- System performance, necessitated by extremely high transaction volumes.
- Single Sign-on for users.

Solution: Bridge-x Customer 360

The company selected Bridge-x Customer 360 to provide a comprehensive, role-specific view of the customer. The solution was conceived and built using SAP Netweaver platform and Service-oriented Architecture and it allowed the company to go from solution fit analysis and blueprinting to deployment in less than 90 days.

More than 8000 users now run Customer 360 and with as few as three clicks of the mouse, they review customer transaction history, pricing and rebates information, customer master data, customer credit information and other relevant customer analytics.

In just one screen, sales users can now review many different data points about the customer; information that prior to deploying Bridge-x Customer 360 was simply not visible to them.

Solution implementation highlights

- Collaborative effort between Bridge-x and customer's teams
- 90 days from gap analysis to deployment

Key Benefits:

Sales productivity gains: Sales meeting preparation time cut from 10-15 hours per week to a few minutes.

CRM adoption gains: An improvement of nearly 40% in overall CRM usage.

Effective account planning: Accurate sales forecasting for managers and planners.