

## SAP Solution in Detail

SAP Solutions for Small Businesses  
and Midsize Companies

# CRM WITH SAP® BUSINESS ALL-IN-ONE

DRIVE GROWTH WITH SUPERIOR  
MARKETING, SALES, AND SERVICE

The customer relationship management functionality in SAP® Business All-in-One solutions helps midsize companies improve marketing, sales, and service management. Integration with enterprise resource planning (ERP) functionality helps streamline processes from lead generation through deal closure to customer retention. Optimize marketing resources and improve segmentation to drive demand; gain a 360-degree view of all customer information; manage sales cycles to win more business; and provide stellar service to keep customers and boost service revenue. Robust analytics provide real-time visibility to key performance indicators across all functions.



THE BEST-RUN BUSINESSES RUN SAP™





## ADDRESS NEW CHALLENGES AND OPPORTUNITIES

### IMPROVE YOUR CUSTOMER RELATIONSHIPS

The CRM functionality in SAP Business All-in-One helps deliver the right message to the right target at the right time, increasing the number and quality of leads.

Your company has grown quickly, so processes that once worked well may seem cumbersome and inefficient today. This means new challenges and new opportunities. How do you fine-tune operations to cut costs and eliminate errors? How do you continue to provide better products, services, and support than your competitors? And how do you identify, acquire, and retain the right customers – and keep sales on target to fund growth – while you meet all those other goals?

If these questions keep you up at night, your company is ready to become a more customer-focused organization. The customer relationship management (CRM) functionality in SAP® Business All-in-One solutions can help. Preconfigured to meet the needs of fast-growing midsize companies, it provides a 360-degree view of your customer information and streamlines end-to-end processes from generating a lead to closing a deal. You can drive customer demand and increase ROI by optimizing your marketing resources – running campaigns, organizing segments and lists, and managing leads to close new business. The software also helps you develop profitable customer relationships by making informed pricing decisions and better managing territories, accounts, contacts, activities, leads, and opportunities. In addition, it helps you maximize service revenue by adding to your portfolio of services – and improve customer satisfaction by better managing orders, contracts, complaints, returns, installed-base assets, and

warranties. And across all marketing, sales, and service functions, powerful analytics give you real-time visibility into key performance indicators.

The CRM functionality in SAP Business All-in-One is based on the SAP Customer Relationship Management application and is built on the SAP NetWeaver® technology platform, the foundation for enterprise service-oriented architecture. As part of SAP Business All-in-One, the CRM functionality is adaptable to meet changing needs, designed to meet industry standards for best practices, and priced to meet the budgetary needs of mid-size companies.

The application offers intuitive Web-like features and online tutorials that help reduce the need for formal training and encourage adoption. Links to key data, snapshots of recent records, reminders and alerts, screen personalization, and an advanced search help team members perform daily tasks more efficiently. Integration with popular desktop tools lets employees centralize their activities and communications to boost their efficiency. Synchronize tasks, calendars, and e-mail systems and export customer and opportunity lists directly to Microsoft Office tools, saving time and eliminating the errors associated with manual data reentry.

The CRM functionality in SAP Business All-in-One helps you maximize profitability and differentiate your company from its competitors.

# SHARPEN YOUR MARKETING EDGE

## TURN INSIGHT INTO ACTION

The CRM functionality in SAP Business All-in-One helps deliver the right message to the right target at the right time, increasing the number and quality of leads with several key marketing features.

**Segmentation and list management** –

Create target groups based on customer attributes, and map e-mail and direct-mail addresses between external and internal lists.

**Campaign management** –

Plan, design, and execute multichannel campaigns that can include personalized content. Use built-in e-mail templates for online communication and an interactive calendar for central coordination of all marketing plans, initiatives, campaigns, and promotions.

**Lead management** – Automatically generate and qualify leads from marketing campaigns and surveys, and publish scripts and surveys to help cold-call sales agents prequalify leads and telemarketing agents qualify prospects.

**Marketing analytics** – Keep all your marketing metrics up-to-date and easily accessible to help generate and convert more leads. Gain quick visibility into lead and order status.

Strong customer relationship management helps you develop and keep one of your greatest assets – your customers. They have more choices than ever in today's global marketplace, and discovering those options has never been easier. Providing a richer customer experience is key to encouraging them to choose your products and services above all the others they see and hear about daily.

When you integrate customer relationship management functionality with enterprise resource management functionality, you can achieve end-to-end processing as never before. For example, you can target a marketing campaign tightly, assign the sales force optimally to pursue leads, empower them with information to price effectively, move quotes seamlessly to sales orders, track orders right through delivery, and enable customers to request maintenance services online.

# EMPOWER SALES MANAGEMENT

## ARM YOUR REPRESENTATIVES FOR THE FRONT LINES

The CRM functionality in SAP Business All-in-One has a variety of features that help make sales representatives more productive, sales managers more effective, and sales executives better armed for timely and informed decision making.

**Territory management** – Align sales resources to advance your sales strategy, optimizing coverage and balancing workloads across well-defined territories.

**Accounts and contacts** – Centralize the information for sales professionals into a single, comprehensive view to manage accounts, including detailed profiles, order and credit history, lists of contacts, service requests, and open campaigns.

**Opportunity management** – Track, analyze, and optimize your sales opportunities from start to finish, automatically assigning partners and leveraging methodological templates and organizational charting.

**Telesales** – Enable your telesales agents to work with account fact sheets that summarize all critical account information. Supply them with call lists and interactive scripts for work with customers and prospects.

**Sales analytics** – Deliver robust sales metrics to help sales and marketing personnel better track and close opportunities, including reports that analyze wins and losses, review the pipeline, and list accounts with open opportunities and activities.

**Customer interaction center** – Enable telesales agents to handle inbound and outbound calls, create sales orders, and up-sell and cross-sell.

Midsized companies are asking questions like these: How do I streamline my day-to-day operations to reduce cost and improve productivity? How do I keep turning out better products, services, and support than my competitors? And how do I establish and develop rewarding customer relationships – and keep sales at a healthy level to fund our growth?

The customer relationship management (CRM) functionality in SAP® Business All-in-One solutions can help.

You don't have to let customer service drain your human and monetary resources. By setting up online self-service for your customers, you enrich their experience while offloading routine processing from in-house staff. While customers help themselves to warranty information and log their own service requests, you can redirect corporate service efforts toward strategic tasks like creating new service offerings and enhancing your delivery models.

# OPTIMIZE SERVICE

## BECOME A LEADER IN CUSTOMER SERVICE

The CRM functionality in SAP Business All-in-One lets you maximize the value of each customer by helping build loyalty, decrease service costs, and increase service revenue through several important service features.

**Customer service** – Manage customer interactions, service requests, quotes, appointments, and customer product profiles and warranties.

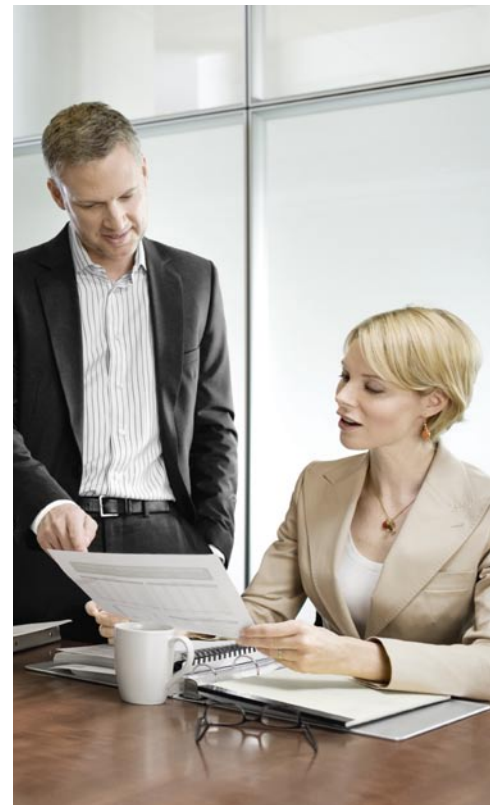
**Service contract management** – Ensure consistent service offerings, pricing, discounts, and terms across a service contract. Give agents visibility into all service contracts at a given site.

**Complaints and returns** – Manage the entire returns process, from capturing a complaint, through receiving the defective product in-house, to creating a credit memo. Enable customers to create and track their own returns and requests for credit, exchange, or replacement.

**Service request management** – Let customers create service requests online for recently purchased products.

**Installed-base and warranty management** – Encourage customers to register their products online, where they can also view related warranty information.

**Resource planning** – Optimize your service resources so you can assign the right resource to the right request at the right time.



Maximize the value of each customer by helping build loyalty, decrease service costs, and increase service revenue.

# REAP THE BENEFITS OF INTEGRATED CRM AND ERP

## STREAMLINE YOUR BUSINESS

The CRM functionality is integrated with the ERP functionality in SAP Business All-in-One to let you fine-tune your business processes from start to finish.

### Order Processing

Create an opportunity in CRM and convert it into a quote in ERP. You can then create a sales order based on the quote, complete with billing and delivery information. Proposal generation, order management, credit review, and product-availability checking extend the marketing, sales, and service functions of CRM. The application automatically calculates pricing, including surcharges, discounts, freight, and taxes. Integration with accounting functions completes the order-to-cash process.

### Delivery, Billing, and Payment

Outbound processes integrated through the ERP software include posting goods, monitoring delivery and distribution, and documenting proof of delivery.

Full billing information is accessible at each stage of order processing. You can create, modify, and delete billing documents and have them automatically forwarded to accounting processes. Manual and online customer payments and down-payment requests process efficiently, and customer invoices and credit notes post with the invoice reference.

### Service Management

The entire service order process, from creating a service request and dispatching a technician through confirming completion, integrates directly with the billing functionality in the ERP software. You can also update your product inventory automatically once a return has been received.

### Integration of CRM with ERP

Customer relationship management (CRM) functionality and enterprise resource planning (ERP) functionality in SAP® Business All-in-One are integrated, so processes run smoothly beginning to end. Create a lead in CRM, convert it to a quote and then a sales order in ERP, and finish with delivery, billing, and service.

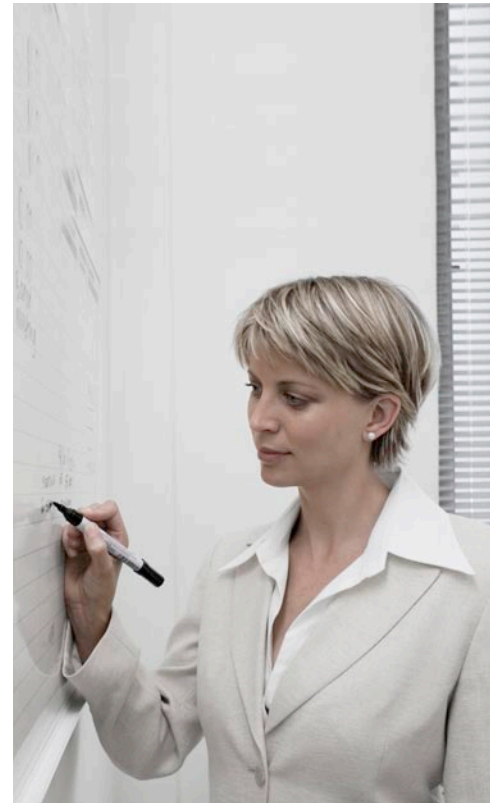
Centralized data and business analytics help ensure one 360-degree view, eliminate manual data entry between applications, and empower all staff to make wiser decisions.

# MAINTAIN EXCELLENCE AND ENHANCE AGILITY

## REALIZE THE BENEFITS OF CRM

The CRM functionality in SAP Business All-in-One can help increase revenue by improving customer loyalty and accelerating time to market. Your sales team can focus on strategic tasks, keeping you competitive and raising win rates. At the same time, you can improve efficiency by streamlining end-to-end business processes, cutting costs and errors, and lowering inventory costs. You can resolve service issues faster and boost customer satisfaction with low-cost interaction channels, including online self-service. And CRM functionality lets you respond nimbly to market change, continually realigning your channels with customer needs and preferences.

To learn more about how SAP can help you improve CRM with SAP Business All-in-One, call your SAP representative today or visit us on the Web at [www.sap.com/sme](http://www.sap.com/sme).



Your sales team can focus on strategic tasks, keeping you competitive and raising win rates.

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## Summary

With the customer relationship management (CRM) functionality in SAP® Business All-in-One solutions, you can boost marketing results with targeted messaging, close more deals with sales tools that improve effectiveness, and increase revenue and customer loyalty with superior service.

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## Business Challenges

- Deliver consistent customer experience across all marketing, sales, and service channels and initiatives
- Provide employees with a single, 360-degree view of customer information and performance metrics for fast response and proactive analysis
- Streamline processes end-to-end for better customer service, efficient operations, and fewer errors

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## Supported Business Processes and Software Functions

- **Marketing** – Quickly segment your customer base, execute and track direct marketing campaigns, move leads from campaign source to closed revenue, and monitor campaign success to manage funding allocations
- **Sales** – Track opportunities from lead source through order processing and closing revenue, and monitor your sales pipeline and a complete list of products and current pricing 24x7
- **Customer service** – Create new service offerings and delivery models to increase revenue; and organize, plan, and assign service employees to address changing service demands
- **CRM and enterprise resource planning integration** – Simplify your IT landscape to support end-to-end marketing, sales, and service for maximum efficiency

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## Business Benefits

- **Higher revenues** as a result of richer customer experiences, increased wallet share, accelerated time to market, and an improved rate of sales closure
- **Improved customer loyalty** due to streamlined end-to-end business processes and consistent look and feel across all functions and channels
- **Improved decision making** based on a single comprehensive view of customer data
- **Greater employee productivity** through increased order accuracy, reduced volume of customer calls, and decreased number of billing disputes

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## For More Information

To learn more about the CRM functionality in SAP Business All-in-One, contact your SAP representative or visit [www.sap.com/sme](http://www.sap.com/sme).

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