

Completely integrated – Implementing a perfectly joined CRM suite at an educational publisher

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Using a state-of-the-art CRM suite as an example, this article illustrates how complex business processes can be harmonized by integrating various best-of-breed systems that are available on the market. The system diversity enabled by the internet – combined with a clear approach to link individual systems – is a huge opportunity for publishers to make even very complex processes easily manageable. Complete integration can work – even beyond the area of CRM.



Unexploited potential as a result of delaying implementing new channels to address customers

Customer Relationship Management (CRM) has been an important topic for publishers that are in direct contact with their customers for quite a few years. This is especially the case for educational and special interest publishers, as the relationship to the people who buy their products has been affected to a particularly large extent by digitization. However, even at companies of this type, CRM is in many cases still restricted to postal address marketing (outbound) and recording processes and events (inbound).

During the past years, the internet has not only been affecting our private lives, simplifying many elements to a great extent, it has also started – with a delay – impacting business processes: Customers tend to send emails instead of letters. They place and check their orders and modify their address information directly using portals. And they use online tools

when looking for titles and information. All of this goes hand in hand with a development that customers now usually expect a higher level of quality regarding fast and accurate processing (expecting that terms and conditions will remain the same). Publishers have reacted by offering their products on web portals (immediately available for shipping and delivery) and in many cases, they offer their own internet-based electronic products for knowledge sharing. So, there is an increasing need to get information about their customers in a comprehensive and timely manner.

The customer relationship management procedures of the past can no longer fulfill the requirements of the internet in terms of speed, accuracy, and perfection. This leads to the question: What are the characteristics of a CRM solution that is fit to the brave new world of the internet?

Modern, powerful CRM enabled by integrating various technologies

Certainly, nobody wants to reinvent the wheel, and nobody can do everything. Publishers are – luckily – not the only market players offering electronic products on the internet. So the answer should be, in the first place: what’s available on the market?

On closer inspection, fantastic new opportunities for solutions arise, however, these new worlds are volatile and subject to sudden change. Problems for which there are no solutions at the moment could soon be solved by many different solutions, and well-established tools that are the solution now could soon be replaced by much better ones.

When new options become available, this results in new solutions which will – in most cases – be brought to market by companies from outside the industry. So publishers have to deal with quite a wide variety of systems and make a careful assessment if – and how – their processes can be covered by which of them. Contrary to the traditional ERP approach with the goal of covering all processes using one single system, it is now vital to integrate various solutions that can easily be combined.

A combination of systems is (the) key

The internet has brought many promising strategies to simplify the integration of various different systems; it has not only caused problems and needs, it has also provided ways of solving them. As outlined below, establishing ‘combinations of systems’ is the key to success for implementing CRM that is fit for the requirements of the Digital Age.



Example: educational & special interest publisher – outbound

Making communicating with teachers more efficient – with very little manual data entry required

In its outbound activities, an educational & special interest publishing company has the primary goal of marketing its products at educational institutions and on the so-called ‘afternoon market’. So it is important to present the authors and their products on the internet in an attractive way and to ensure that these products which are being advertised are always available for online purchase. When introducing books at schools, teachers usually receive inspection copies. Teachers should order these copies (free of charge) using the web shop, as this ensures that the publisher knows who ordered these copies (is he/she really a teacher?) and how many (has he/she ordered too many?).

Once the copies have been shipped, it is vital to start follow-up actions – not just one, but several ones. Convincing teachers to order the books for the class is just one element; it is also important to get and understand their opinion, so modifications can be made to the next edition, if many people express the same concern about a product. But all of this should happen with very little manual effort.

Invites to training sessions

A second goal is to be able to invite customers to training activities (in most cases free of charge and organized in different cities): Sending these invitations (containing all relevant information) to customers should be easy, and they should have the option to register for a training session of their choice prior to, while, or after buying a product.

To achieve this, the following is required:

- An ERP system for recording and processing orders
- A product portal with a web CMS connected to a web shop
- A CRM solution
- A professional mailing system featuring a newsletter functionality
- A survey/questionnaire solution
- An event management solution

In order to achieve a high level of automation, the systems should not be implemented as separate modules; they should be integrated at the central process points.

... and the event management system

In addition to the elements already described, the product portal also offers a list of current events. If a customer selects an event, detailed information is provided, and a registration can be made instantly. The registration process is done in the event management system which is linked to the portal.

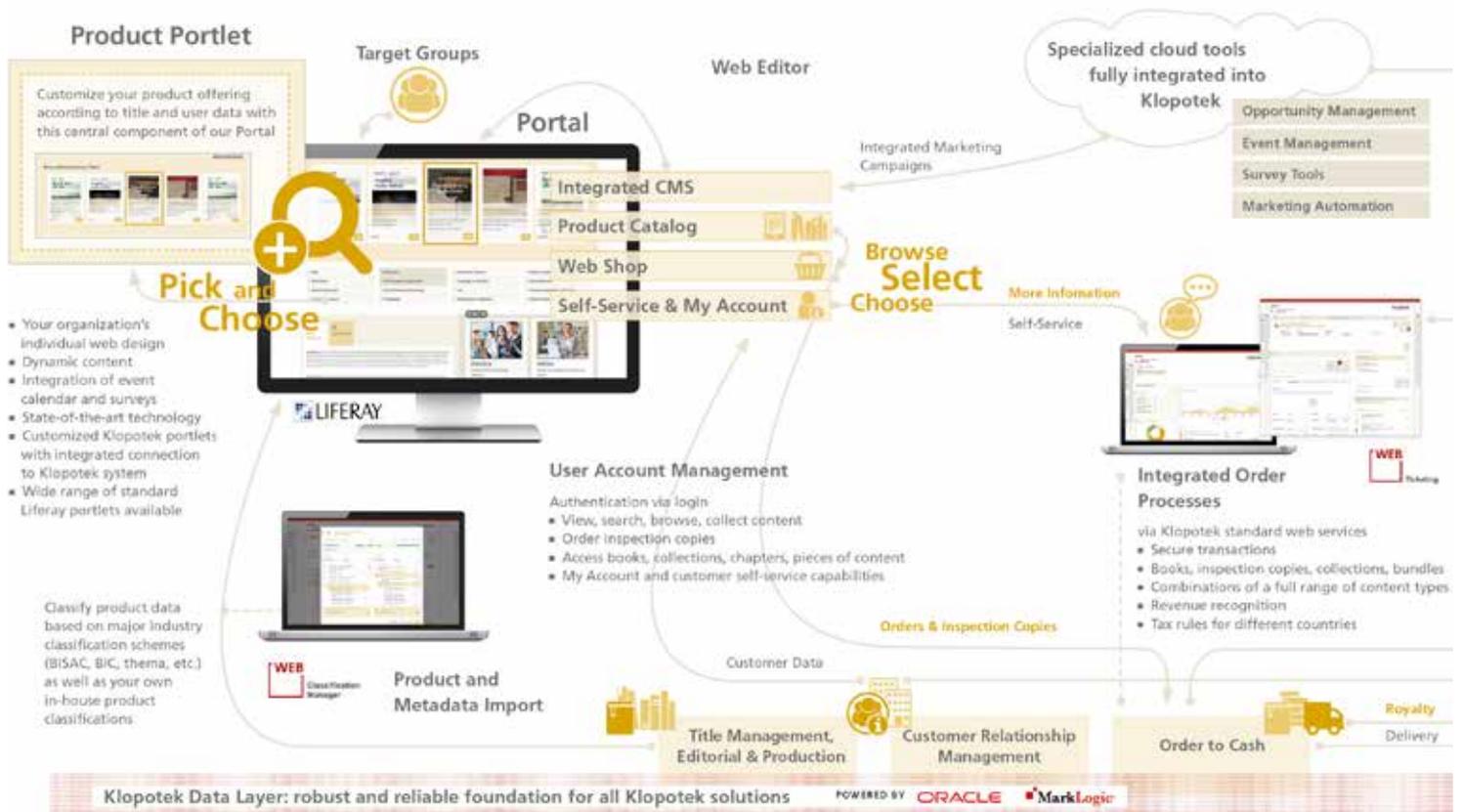
If orders are done for which it is relevant, the ERP system can also notify various individual applications (in use by the customer) about the successful purchase of an electronic product (access to a research database, e-book). For this, it is not relevant if the order is placed using the web shop, the ERP dialog system, or a different interface.

Message-Based Services for exchanging address information

As Salesforce is very flexible, we created a special structure for handling contacts in this system that is very similar to the ERP system, thus enabling data mapping in a simple way. As a standardized software, the ERP system provides 'Message-Based Services' which – working in the background – send a message without any delay if changes to address data are made. This message is delivered to a Salesforce service that understands this information and immediately makes the necessary changes to the data structure in this solution. So, newly created customers, changes to address information, and new sales order items are always available in Salesforce and can be used for CRM processes.

In case changes to address information should be done in Salesforce, the ERP system also provides a browser-based interface which is directly accessible from the Salesforce system, indicating which contact should be modified. By so doing, the user gets instant access to the rich functionality of the ERP system for managing contacts; there is no need to switch to (and login to) another system. As all changes done in the ERP system are immediately synchronized, all information in Salesforce is also always up to date.

Klopotek STREAM



Create campaigns, e.g. for drip marketing activities

Based on contact and order data, campaigns can be created in the CRM system which are automatically forwarded to the mailing solution. Using the latter, dedicated newsletters and drip marketing processes can be designed and started. As part of these processes, transaction data – such as product references to products that have been ordered, the customer number and order references – is forwarded internally.

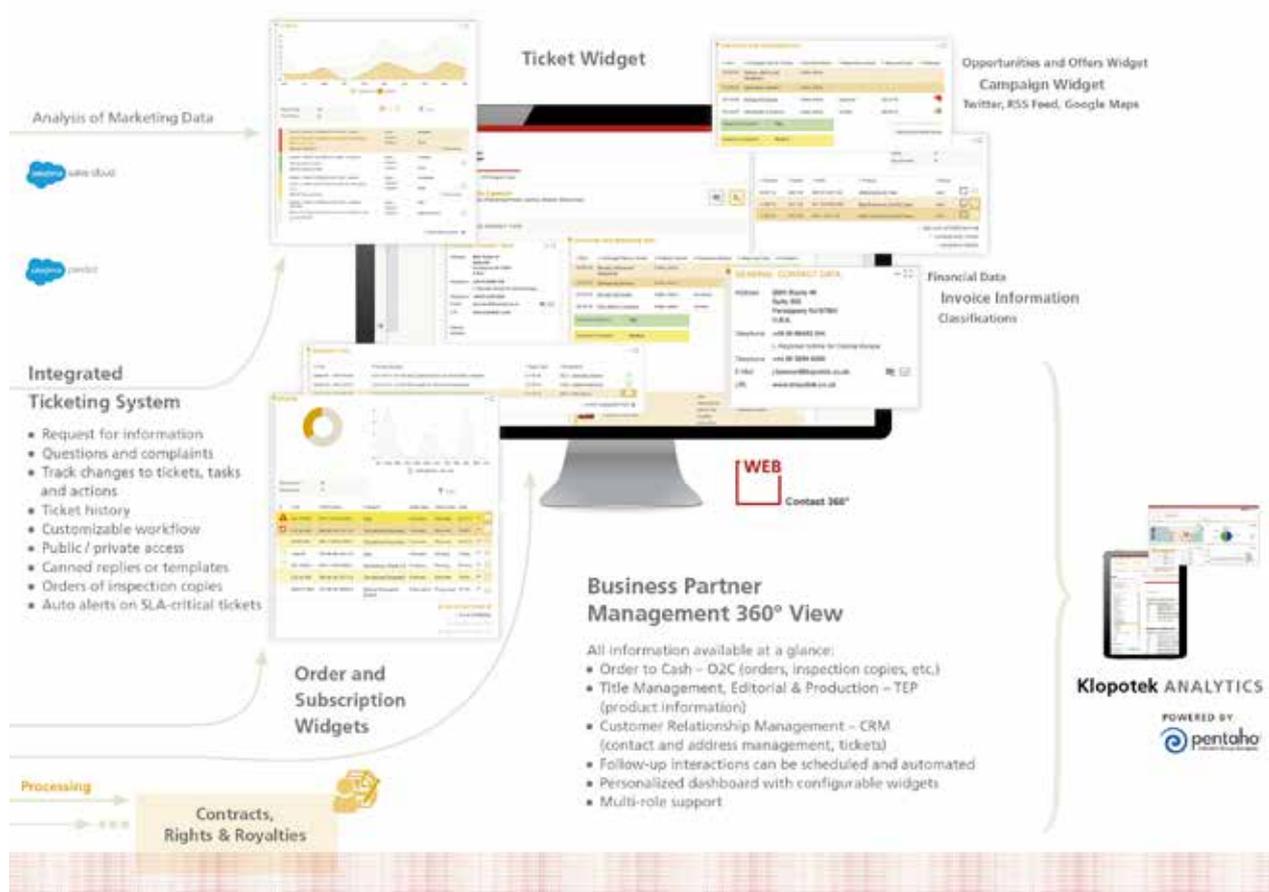
As a result, it is possible to dynamically provide emails and newsletters with references to the survey system and to include a link for the recipient that takes this customer to the correct survey corresponding to the product which has been ordered. The survey system stores the results, performs evaluations and send this information back to the CRM system. In the latter solution, this data (as it has been enriched with product, customer, and order references) can be associated with the corresponding contacts.

Event management is done in a similar way; when a direct booking from the portal has been done, the event management solution is provided with reference data. And, by using campaigns directly from the event management system for creating emails, it sends accurate data on the booking behavior of the contacts back to the CRM system.

In all of these cases, for integrating the solutions for event management, doing surveys, and sending emails, standard interfaces are used.

Interim conclusion: complex processes should be covered in the simplest possible way

All in all, the example described above is a highly integrated combination of systems capable of handling complex processes in an easy way. The number of interfaces is determined by the number of systems which have to be combined; the goal is to always focus on what's relevant. Each system is only used for the purpose it was created for. None of these systems is modified in order to try to provide functionality that is provided by others.



Example: educational & special interest publisher – inbound

Customer services: a field that is expanding in terms of tasks which are to be covered

If managing relationships with customers is not only regarded as an outbound process, probably the first thing that comes to mind is support for the customer service department. Work in this area is no longer restricted to creating orders and giving information about invoices and payments, as there is a growing need to also support customers in using digital products offered by the publishing company. So, there is a greater variety of tasks and of ways of getting in contact with people who can assist.

Let's take a closer look at the input channels: Normally, a portal provides a contact page enabling customers as well as users who are not registered to get in touch with the publisher. An activity which has been completed using a contact page will create a ticket in the internal system or, in most cases, simply create an email that contains the question and contact data and this email is sent to a specific employee (simple solution) or basket (more advanced solution).

Customers also tend to email their questions directly to customer services or dial the number of this department. Other options that are also still to be considered is sending a fax or a letter.

Important elements of modern customer services: documentation, 'channeling', answer quickly

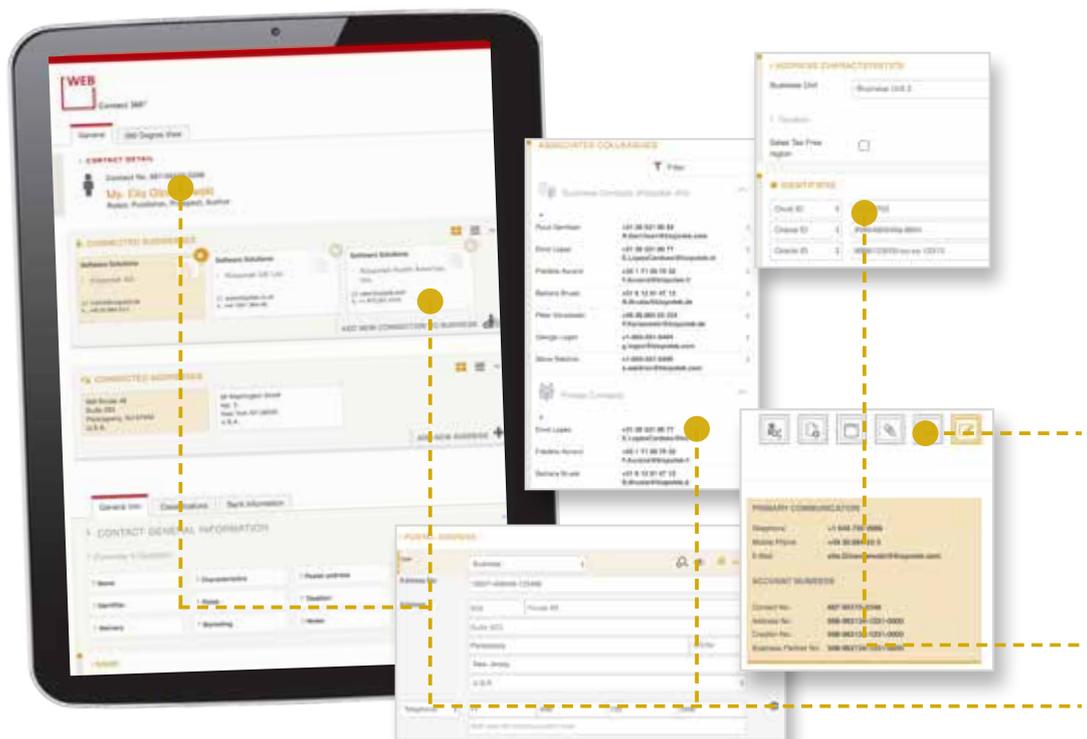
Until a few years ago, employees in customer services were likely to be responsible for checking the (physical) inbox on their desks and answering the phone, saying: "Please tell me your customer number ... thank you ... please wait a moment for the computer to show me your data." Nowadays, intelligent VOIP systems, document systems sending faxes per email, and – most importantly – a much larger number of incoming emails in general are creating new challenges for customer services. Several aspects should be considered:

- Unified documentation of business transactions/inquiries
- 'Channeling' of various ways of communication
- Quick and efficient answers to the customers

Short administrative paths, no loss of time

To achieve unified documentation of business inquiries, a central ticketing system should be employed to handle all activities related to a specific customer (and to non-customers) by using individual tickets. This solution should, of course, offer processes for completing the necessary tasks for closing a ticket, but also for general ticket management to harmonize internal processes. Another important requirement is providing integration with the ERP system for exchanging contact data. The customer (who has already been identified as part of processing the ticket) should be used as an 'input parameter' for providing information/answers and creating orders. This is a key element of establishing short administrative paths and ensuring that (almost) no time is lost – so customer services will reach a higher level of efficiency.

WEB
Contact
Manager



Automated presorting process: assigning emails to dedicated baskets

The various communication channels used by the customers should internally be reduced to phone and email. Ticketing systems provide options for managing a number of email baskets: tickets that are created (based on configurable templates) are placed in these baskets by the system depending on which key words are used in the text (either as an email or as a letter and digitized by using OCR) originally sent by the customer (e.g. "order", "cancellation", "subscription", "address"). So, by using several baskets, it is possible to presort, organize and assign tickets to individual specialists in the department without reading them first. As the ticketing solution is integrated with the ERP system, the (email) address of the sender can be used for automatic identification of the customer. So from the very beginning of working on a ticket, the employee knows who the sender/customer is and can be assured that the ticket is related to his specific area of work (e.g. handling subscriptions).

Make telephone systems smarter by using interfaces

Intelligent phone systems are capable of retrieving the information of services of third-party systems and of interpreting this information. So, it only requires a small amount of integration effort using a minimal user interface to make it possible that the number of the caller is checked in the database, that the call is forwarded to an employee, and that this employee will see – if the identification has been successful – a page with information on the customer who is calling on the screen prior to even starting the call.

SAP and Klopotek as central elements

A requirement to make this possible is that the third-party system provides interfaces for identifying customers and for loading the contact data of customers. In our example, these elements were integrated:

- the SAP Contact Center (for telephone services)
- the Klopotek STREAM app Ticketing (a state-of-the art ticketing solution)
- the Klopotek STREAM app Customer 360° (for flexibly providing information to the customer)
- the Klopotek STREAM app Contact Manager (for handling address data)

Minimal interfaces ensure efficient exchange of information between the systems without unnecessary data redundancies.

Salesforce / financial system: Customer 360° directly displays data of third-party systems

In addition to the applications named above, the STREAM app Customer 360° makes it possible to display the data of third-party solutions. Using widget technology, the data on the selected customer that is available in Salesforce is visible at a glance, and the employee who is dealing with this customer can see: Which campaigns was the customer involved in? Which events did the customer participate in? Which trial copies did the customer order, and what's the status regarding these copies? This approach of presenting data of external systems in STREAM apps also makes it possible to display data directly from the finance system – another way of avoiding data redundancy.



So, what's the art of integration, bottom line?

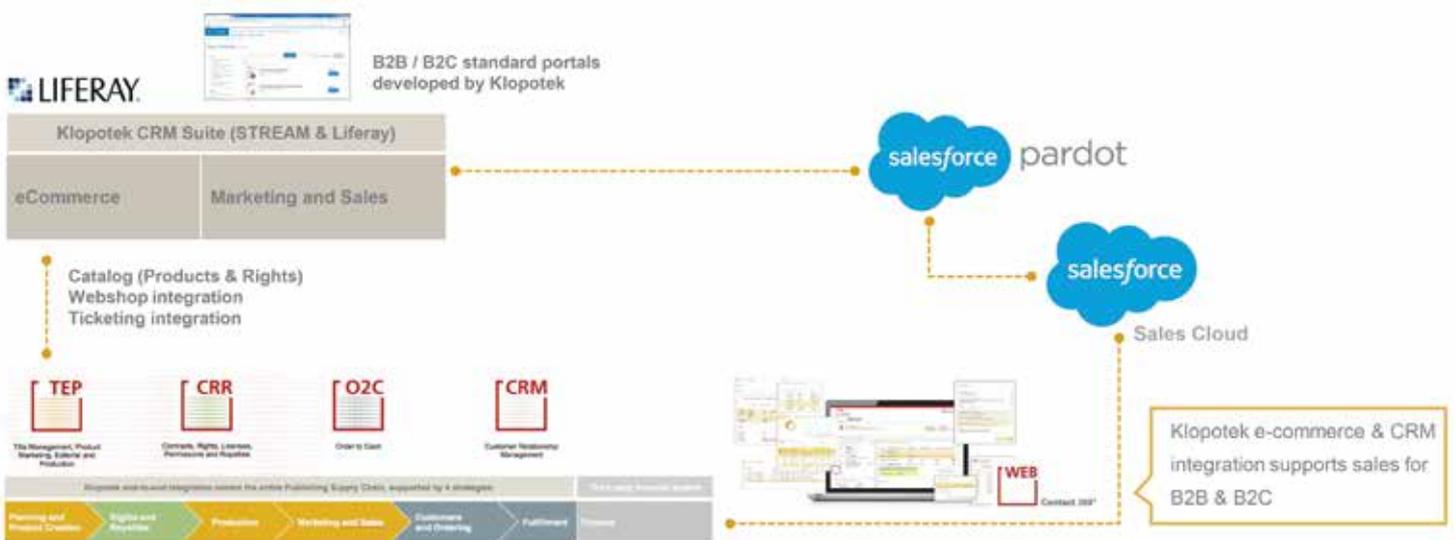
The art of achieving a 100% integration (which is also manageable and does not cause any issues) can be described as being able to ensure data keeping without redundancies relying on minimal interfaces and making use of the individual strengths of the various systems that are linked.

This should be kept in mind: increasing levels of data redundancy will lead to higher risks of not or no longer being able to manage the integration processes – which will result in increasing efforts and costs.

Real-life examples / a key strength: interchangeability

The concepts and elements of integration that have been presented here are real-life examples that are in use at a publisher. The key strength of our approach to integration is that all individual elements can be exchanged. There is no need to select Salesforce as the CRM system; the same applies to using Lyyti as the event management system.

The important message, bottom line, is that all systems and concepts that are part of the overall solution should enable processes without redundancies and provide communication services for interaction that work in a simple way. As a result, 'hard-wired' interfaces for mass data exchange are obsolete.



The Klopotek portfolio with our integrated CRM solution

