

# Enabling an Integrated & Effective CRM-SFA System to Ensure Improved Business Process & Cost Efficiency



## **SITUATION**

The client was using multiple numbers of disparate applications to manage and monitor its sales force and customer relationship management activities. Some of these were even in verge of technological obsolescence and required up-gradation

## **IMPACT**

Lack of a comprehensive and integrated system hampered seamless flow of information, preventing the company to get a holistic view of its customers (sales channel) and plan and execute business decisions effectively. This further resulted in longer sales cycle time

## **RESOLUTION**

Implementation of a comprehensive CRM solution, integrating sales and service aspects, enabled the customer to meet its business requirements. ITC Infotech developed a streamlined and automated solution, based on Siebel Consumer Goods Handheld package that helped to support the business objectives unique to the region

## The Customer

The customer is one of the largest companies in Dominican Republic with a turnover of \$600 million. It enjoys a dominating market share in breweries and tobacco segments within the country as well as in many other global markets.

It was the first brewery in the Dominican Republic and the largest in the Central American region. Headquartered in Santo Domingo, it is also the leading beverage company in the region with businesses in beer, malt and soft drinks.

## The Need

The prerequisite was to handle and monitor its sales force and customer relationship management activities towards achieving sales effectiveness, across multiple relationship points.

The company did not have a comprehensive solution that could give it a centralized and an automated system to manage its CRM and sales force activities. Lack of a comprehensive CRM solution, integrating sales and service aspects, prevented the client to get a complete view of its customers across multiple relationship points. It also resulted in longer sales cycle time.

It therefore, became very important to have an integrated and cost effective system in place to manage the client's CRM and sales force activities. The core client requirements that were identified are:

- Implementation of a comprehensive CRM solution that integrates sales and service aspects and provides seamless flow of information across channels
- A scalable and flexible solution that would support future business expansion and capability to add new functionalities, as well as capture and store data at one place and generate reports and analytics for all sales and CRM activities
- Plan, develop and implement the retail execution processes to achieve maximum reach and distribution
- Some of the existing applications had reached a stage of technological obsolescence, hence needed up-gradation
- Streamline operational aspects through Business Process Automation
- Seamless integration with downstream ERP processes

## The Challenges

The company had a large number of legacy applications that created data in silos and impeded the flow of information. This was a situation that had to be simplified.

- **Critical Functionality Gaps** - identified during the discovery phase of the project in terms of client business requirements vis-à-vis Oracle's Siebel Handheld package offerings. These functionalities were very important for the customer without which it would not have gone ahead with the implementation. Siebel Handheld solution, which was the pre-chosen technology platform, is limited in terms of the customization capabilities. ITC Infotech had to rely on Siebel Handheld COM Extensibility (SHCE) framework to address the gaps
- **Aggressive Timelines** – our project team had to handle aggressive timelines and complex business situations. The team, therefore, had to try and work towards managing changing requirements and yet deliver the solution to meet the business objectives
- **Product Limitations** – numerous product limitations were uncovered during various stages of the project. To overcome these, ITC Infotech had to devise a custom print utility program, develop workarounds and incorporate additional customization
- **Usage Patterns** – several issues aroused due to inappropriate usage pattern, hence disturbing the customized program running behind. To address this, certain additional codes and system controls had to be built, followed by extensive training of the users. Had to incorporate (Component Object Model) COM DLL (Dynamic Link Library) changes to make the process more water-tight and reduce errors that were not easily discernible

## The Solution

Domain knowledge in Consumer Package Goods industry, and expertise and experience of having implemented enterprise level CRM and SFA solutions made ITC Infotech as the chosen implementation partner for the customer.

Oracle's Siebel Consumer Goods and Siebel Consumer Goods Handheld was the pre-chosen technology platform, based on which ITC Infotech designed the solution roadmap and implemented the application for handheld devices to be used by the sales representatives. ITC Infotech



has been involved in all phases of the lifecycle implementation, right from requirement capture to go-live and post production support.

A detailed process-wise, navigation based functional design document was developed to facilitate the customer for an effective adoption of the new system. This is the first project to use Siebel Handheld COM Extensibility framework (SHCE) to extend functionality on Handheld devices. The team also developed unique Integration approaches to ease deployment and maintenance activities. Since the project went live, ITC Infotech has been supporting and maintaining the application.

#### **Some of the salient features of the solution:**

- Implementation of business processes that are unique to the specific client requirements (not offered by Siebel OOB):
  - **Free Goods** - Feature to allow the client to create multiple options for free goods to be given as part of special offers/schemes along with certain lines of selected products or brands, or with certain quantities of products purchased by the sales channel. In Siebel only volume discount in percentage as a feature is available. Therefore, required customizations using Siebel COM Extensibility framework were made to accommodate this particular functionality required by the client
  - **Discount Plan** - Combo discount plans had to be included for various types of products based on pre-defined slabs. If a set of products are grouped together and the total quantity falls into the buckets of the required slab structure defined, then the appropriate discount percentage is applied for the order as per the corresponding percentage for the Slab. Further, there were different discount metrics for cash and credit discounts which had to be calculated. It was a humongous task as the numbers of combo discount offers were many in number, considering the client's wide range of products and brands
  - **Invoice Splitting** - Based on the different payment terms and credit cycles associated with different products, invoices are raised. In a single order, the invoice further needs to be split as per the multiple payment terms for different products, and the print-outs taken through the handheld devices are given out to the sales partner. Also each of these invoices has a unique 16 digit NCF number (unique code) which is a combination of various metrics. To support the client requirements, ITC Infotech had to design and integrate a customized print utility program within the application that works on the handheld

- **Handling of Empties** – Functionality for insertion of crate charges and refunds, specific to the beverage industry in the region, has been built within the system. This entire process again needed lot of customizations as all these complicated computations had to be done on-spot within the handheld device before generating the invoice
- Custom print utility program has been devised to enable invoice printing at handheld level
- Custom built rewards and redemption program
- Unique integration approaches to ease deployment and maintenance activities

## Business Benefits

- Comprehensive CRM solution that integrates sales, marketing and service aspects
  - System provides an unified view of the customer/sales channel across various touch points
  - Coverage includes all functions like pre-sales, telesales, van sales, delivery and CRM functions like refrigeration, merchandising and service management
- Consolidation of disparate custom built applications into one comprehensive enterprise solution
  - The new system has faded out about 14 such custom applications which had reached their technological obsolescence
- End-to-End visibility of the processes, right from customer creation to realizing the financials
- Robust integration with back-office SAP system, thereby reducing overall order cycle times
- Effective workflow and notification mechanism, enhancing sales and service experience
- Organized dashboards and reports for management reporting and further actions
- Improved planning and effective execution of business processes has helped to increase number of daily customer visits
- Reduced operational costs



