

ERP WITH EMBEDDED CRM—GET THE BEST OF BOTH WORLDS

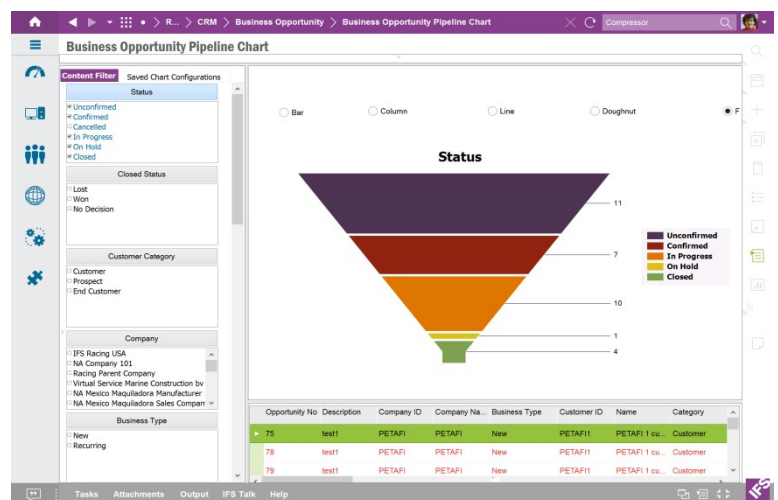
Despite deeper penetration of CRM strategies and the expansion of relationship management to supplier and other areas, many organizations still have poor visibility into other processes (delivery, service, projects, support, financials etc.) through their CRM solutions. Often there is also little or no visibility into the CRM process from their back office ERP solutions, leading to decisions being made based on old or incorrect information. With the new CRM solution in IFS Applications™ 9 the borders between CRM and ERP have been erased, processes made seamless, and information made available.

BUILT-IN INSTEAD OF BUILT-ON

Most if not all major CRM products in the market today deliver comprehensive sales automation support, but they are delivered as built-on products integrating back to the ERP, which carries cost, complexity, limited integration, risk of low data quality and often lengthy projects.

With IFS Applications 9 and the new embedded CRM solution however, we offer new exciting CRM capabilities out of the box, reducing implementation time, complexity and TCO:

- Single user interface—No need to log into ERP and CRM systems separately to find the information you need to make the right decisions
- The right information in real-time—in IFS Applications 9 CRM there is no need to integrate and synchronize data
- Seamless workflow—manage your leads, prospects, opportunities, quotations, orders and more on one common process/client enabling a transparent Quote-to-Cash process.
- Customer lifecycle management—has never been easier with all customer info at your fingertips
- Dynamic and extendable data model—use the new IFS Configuration & Extensibility™ component to extend the data model adding new fields, data sets or business rules
- Access to other framework features—with CRM being a part of IFS Applications all current and future capabilities such as IFS Lobby™, IFS BI™, IFS Touch Apps™, IFS Streams™ and much more are also available for CRM
- IFS Product and Services Partners will now be able to engage in projects in CRM, opening up a new world of opportunities



The dynamic Pipeline Chart in the IFS Applications 9 CRM allows for easy opportunity data analysis filtered by a number of criteria including status, stage or customer, representative, etc.



WHAT CUSTOMERS SAY

Customers in the Early Adopters Program, who implemented IFS Applications 9 before the formal release to market, have rave reviews for embedded CRM.

“I have been told by our sales and marketing teams that it is so much easier since everything is embedded in IFS Applications,” Spang Operations Analyst, Sandy Sable, said. “To be talking to a customer on the phone and have everything right in IFS Applications without having to jump out and log into the IFS Sales and Marketing module—that is something the sales people and the marketing people who take the calls are very happy with.”

“It is not a CRM client anymore. It is an ERP system with CRM functionality,” Beijer Electronics CIO, Joakim Stolt, said. “So the starting point for using the ERP is often the CRM, and you need to make this very intuitive for the sales guys.”

Embedded CRM will also shave time off typical sales processes and reduce the total cost of ownership, according to Spang IT Director, Brian Buddemeyer.

“It will be a time saver since it’s embedded in IFS Applications,” Buddemeyer said. “The people involved in handling those processes seem more motivated to use the system and maintain the prospect data through the sales cycle. We will have a much cleaner set of more usable data. The other time saver is more technical. The old IFS Sales and Marketing was by comparison difficult to maintain and keep running, and there were a lot of support cases which now will go away.”

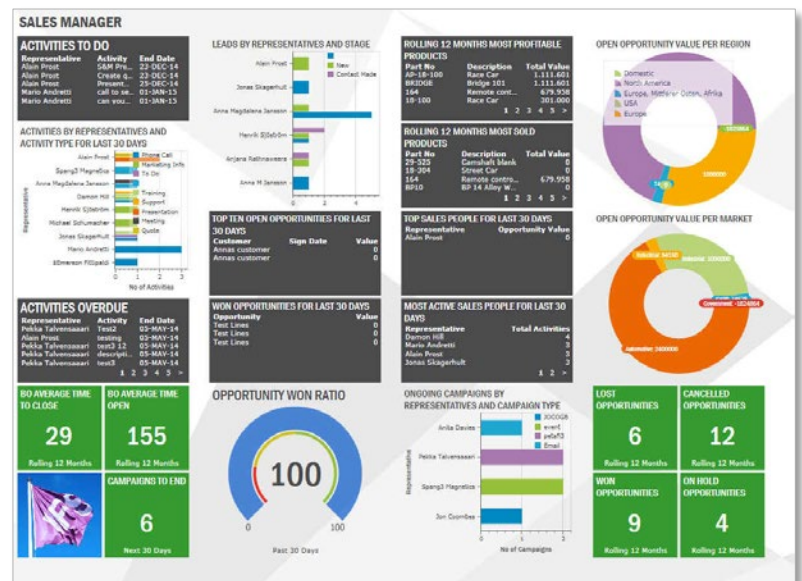
LEVERAGE OTHER USABILITY FEATURES FOR STREAMLINED SALES

Sales professionals are hired to what they are best at—selling, and they should have the information they need to run an efficient sales process one click away. Functionality in IFS Applications 9 like IFS Lobby, designed to unite essential data from various screens and queries into a single, configurable view, adds real value to embedded CRM. While role-based interfaces are common, IFS Lobby puts creation and configuration of interfaces into the hands of business analysts and end users. Some lobbies for sales and CRM come configured out of the box in IFS Applications 9, but customers are already creating lobbies of their own!

“They don’t need to see all of the ERP information—they just need to see what we have prepared for them,” Stolt said. “And that is why I am saying the lobbies are crucial. They allow us to package data from CRM and office data from ERP into a view that makes sense.”

LEARN MORE

To find out more about how IFS can help your organization maintain its competitive edge, visit www.IFSWORLD.com.



Lobbies offer a configurable dashboard overview that serves as starting point of your daily work. Essential data that may be sourced from multiple screens.