CHAPTER 1: RELATIONSHIP MANAGEMENT OVERVIEW

This chapter introduces you to the concept of Relationship Management and the product. In this chapter, you will also learn about some steps that need to be taken when implementing Relationship Management and the benefits of an integrated solution: ERP (Enterprise Resource Planning) and Relationship Management. In addition, you will learn about the vision for Relationship Management and the overall structure of the Relationship Management application area.

This chapter contains the following sections:

- Defining Relationship Management
- Relationship Management Application
- Selling Points for Relationship Management

Defining Relationship Management

To Microsoft® Business Solutions–Navision®, Relationship Management is more than just a set of products – it is a method designed to manage all your contacts and the interactions you have with them and . It is also a business strategy to identify, attract, and retain customers; this, which helps businesses to optimize profitability and increase customer satisfaction. Just because you implement this software solution for a customer does not mean that this customer has a marketing strategy. Defining a strategy should actually be the first stage in implementing customer Relationship Management. The process should start with companies implementing a marketing strategy before they go on to implement a system to support this Relationship Management.

The goal for your customer clients is to establish long relationships with their customers. Relationship Management systems will help them create and maintain these relationships. Clearly, this means that your clients have to start by deciding to become a customer-focused company and then determine a strategy to achieve this. If the Relationship Management strategy is not effective, there is the strong possibility that the implementation of a Relationship Management product will fail. A successful Relationship Management implementation integrates business processes with IT systems.

The Benefits of an Integrated Solution

CRM complements Enterprise Resource Planning (ERP) and is dependent on integration with an ERP system to provide a complete picture of a customer relationship.

For example:

- Marketing people need to know what customers have purchased in the past before attempting to interest customers in new products or cross-selling opportunities. This information may come from an order history file in the ERP system.
- Salespeople need to know if products are available before accepting new orders, ensuring that the products can be delivered to suit the customer's need. This information may come from an item card in an inventory management module.
- Production managers need to have a complete overview of vendors and when specific vendors will deliver material used in the production.
- The Finance Dept. in the company needs fully updated and accessible information from the company's bankers.
- Service people need to know if a customer has been billed for or has paid for their support contract before responding to support incidents. This information may come from billing or cash receipt information held in an accounts receivable module.

- Business partners need to be able to see customer-related ERP data, just as e-customers ordering online need to know that the goods they are ordering are in stock and quoted at the latest price. This information may come from an inventory control module.

In all these examples, different groups of people in a company need to access information stored in different places. When using an integrated solution, the whole company shares and has access to different data information silos, and this enables everybody in the company to always have an entire overview of the customers.

Relationship Management Application

In this section, we will look at the product Relationship Management. We will introduce you to the ideas and vision behind Relationship Management and to the structure of the product.

Vision for Relationship Management

Communication is a key word in the vision for Relationship Management. Our ambition is that companies using Relationship Management will be able to tailor communication with different customers (both existing and potential), vendors, business partners, and others according to their needs. We believe that this is necessary for companies if they want to succeed in the future.

This means that Relationship Management is a tool that helps companies communicate with their customers based on their previous interactions. This tool also makes it easier for enterprises to keep track of all the documents that a company sends to its customers.

This allows enterprises using Relationship Management to communicate with their customers on a more individual basis and thereby enables them to perform one-to-one marketing.

The Structure of Relationship Management

In this part, we will present the features and granules that are included in Relationship Management.

The datasheet for Relationship Management is represented in the table. The Key Features column presents both the key features of Relationship Management and also the six granules that Relationship Management consists of. Contact Management is the basic granule, and Relationship Management cannot be sold without this granule.

Key Features	Description
Contact Management	Maintain an overview of your contacts. Duplicate check automatically alerts you if you enter contact information that already exists. Categorize your contacts based on profiling criteria created by you. Personalize your approach to your contacts.
Task Management	Organize your campaign, marketing, and sales tasks. Create to-do lists for yourself. Assign tasks to other users or teams of users recorded in the program. Create an activity composed of several to-dos. Create internal to-dos without a contact.
Contact Classification	Classify your contacts into different categories, and tailor your marketing messages to suit the individual needs of the customer. Automatically group your contacts into different classes based on criteria specified by you, for example, group contacts in terms of revenue. Rate your contacts based on the weight of two questions to identify the value of a third question.
Campaign Management	Organize campaigns based on the segments you create. Segment your contacts based on specific criteria, such as sales, contact profiles, and interactions. Reuse existing segments, for example, specify whether or not these segments are to be updated every time new information on the contact is entered, or “freeze” the group for follow-up activities, such as direct mailing Make use of multilanguage templates to target contacts in different languages. Mail merge the identified segment with a Microsoft® Word document.
Document Management & Interaction Log	Log the interactions that you have with your contacts, such as a telephone call, a meeting, or a letter. If an interaction contains a document, you can save it under the relevant contact and keep track of the document in question. Record interactions performed in other application areas, including documents sent to your contacts. Call a contact simply by clicking the button on the contact card and using TAPI (Telephony Application Programming Interface) compliant telecom devices.

Key Features	Description
Opportunity Management	Keep track of sales opportunities. Section your sales process into different stages. Maintain an overview of opportunities in your sales pipeline.
Contact Search	Search for all information related to a contact, such as an opportunity, an address, or a comment. Misspell the contact name, and you still retrieve information as "fuzzy" logic functionality is available.
E-Mail Logging for Microsoft Exchange	Log all your e-mail correspondence – inbound or outbound. Log your e-mails sent through Microsoft Navision or sent through Microsoft® Outlook®. This is a server-based solution used to keep your e-mails in their natural environment.
Outlook Client Integration	Synchronize your to-dos and contacts in Microsoft Navision Attain with meetings, tasks, and contacts in Microsoft Outlook. Create, update, cancel, and delete records in one program, and the other program is automatically updated. Gain access to contact information when you are working offline. Update your information through a batch job when you are online again.
System Requirements	
Microsoft® Exchange Server (min. version 5.5 with service pack 4) for E-Mail Logging for Microsoft Exchange. Microsoft Navision supports graphical 32-bit technology and genuine client server, multitasking environment. The following operating systems are supported: Client 32-bit: Microsoft® Windows® XP, Windows® 2000, Windows® NT, and Windows® 98 Server: Navision Database Server: Windows 2000, Windows NT, IBM AIX Microsoft® SQL Server® Option for Navision: Any operating system supported by MS SQL Server 2000.	

Selling Points for Relationship Management

This section contains the selling points for Relationship Management. This is not a very in-depth discussion of the selling points and is only meant to give you an overview. You can find a more in-depth discussion of the selling points in the "Selling Against Sheet for Relationship Management." You can obtain this sheet from your local Microsoft Business Solutions office.

Integration to the ERP Solution

A company only has to know one software platform.

The product application area is completely integrated within Microsoft Navision Solutions. It is a front-office application that is supported by back-office information.

Easily Adapts to Your Way of Working

It is possible to customize the application to meet specific needs. This gives competitive advantages.

Easy to Use

The new wizards, which are an integral part of Relationship Management, help users to work easily with the product. Using the product is quick and easy to learn.

All the Information You Need in One Place

Customer information can easily be accessed while talking to a customer on the phone. Communication is individually tailored to each customer, and customer loyalty will increase as a result.

Quick Interaction: Lessons Learned

Take a moment to write down three Key Points you have learned from this chapter:

1.

2.

3.