

White Paper

CUSTOMER RELATIONSHIP MANAGEMENT

THE e11 WAY

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E XECUTIVE SUMMARY

With the advent of internet the role of CRM within an organization is changing. Managers and team members need to stay ahead of the competition, collaborate on projects and help the flow of information internally and externally. This white paper is aimed at providing organizations understanding of how a web-based Customer Relationship Management (CRM) system can dramatically improve their ability to effectively run web based campaigns, track leads, convert leads into sales, deliver responsive service and support to internal, external customers and partners. Additionally, such a system offers a means to improve workflow and manage multiple issues, inquiries and tasks – while completing work on time. This paper outlines the benefits of an online CRM system, the requirements to implement a fully web-based system, and how an organization can easily get up and running with a web-based CRM system, such as e11.

Changing Role of CRM

The explosion of new channels and new media, in particular the web, has caused organizations to look at ways to exploit the benefits of these new channels. Customer wants the flexibility of being able to choose when and how they make contact, whether via the phone, web, email, or fax. The challenge for organizations is to look for low-cost solutions that will ease the development and deployment of new and existing applications over multiple channels. Web enablement is not enough, organizations need solution that have been built from the ground up to be web centric.

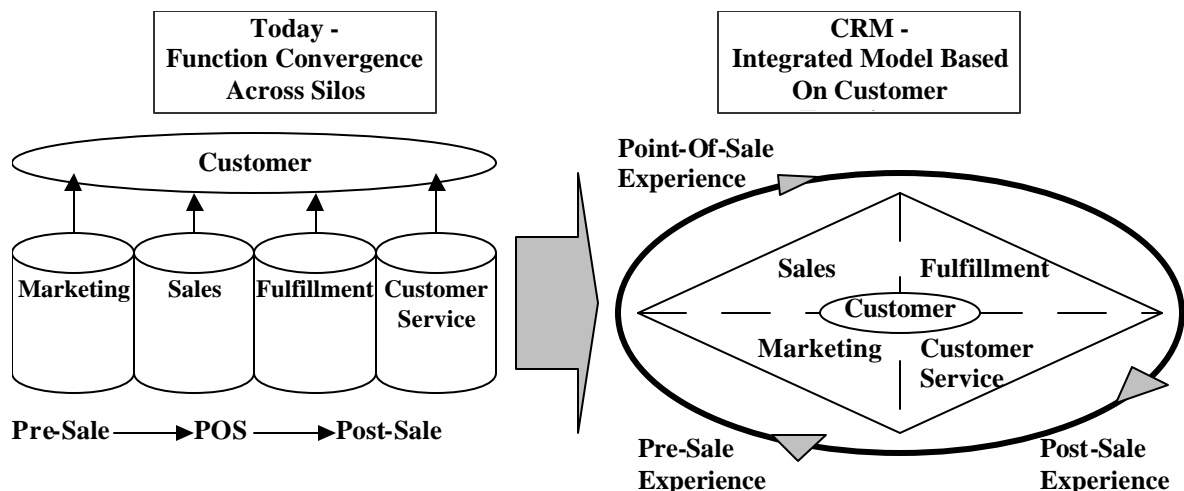


Figure 1: Changing Role of CRM

Before organizations begin the task of implementing CRM across the enterprise, they must first redefine the enterprise, putting the customer into focus. Most organizations are structured by functional specialization (for example, marketing, sales and customer service) in which each department has a unique relationship with the customer. In this model, there is no comprehensive view of the customer and no comprehensive strategy for the relationship. The enterprise typically does not understand the existing or potential profitability of that customer.

On the other hand, an end-to-end CRM customer strategy focuses on the complete customer value chain. In this model, lines of business collaborate around the customer, focusing on enhancing the customer experience and increasing customer lifetime value. Figure 1 depicts the migration from a traditional organization to a customer-centric one.

Key Players and Their Requirements

People use terms like CRM, eCRM, web based helpdesk etc., but different users of CRM system like customers, organizations, managers, team members and customer service representatives defines CRM differently. With the advent of internet and other technology inputs, demands of the key player is all time high from a CRM System.

- ✦ **Customer Perspective** – ideally wants quick answers and solutions. The fastest way to achieve that is to access a knowledge base and get answers at the customer's own convenience. If such access is not available, the customer wants prompt help without frustration. The customer does not want to hold on the phone for a long period of time or be forced to make numerous follow-up contacts or provide redundant information to simply get answers. The customer would like to get answer of their queries quickly during the first contact.
- ✦ **Customer Representative's (CR) Perspective** – wants sophisticated facilities to search the knowledge base to deal with different inquiries. If an answer does not exist in the knowledge base, the customer representative wants a simple way to log in or record the problem at the help desk and assign it to a second-tier person, who may be located in a distant facility, for resolution. The customer representative also needs to be reliable and efficient to keep pace with support volume.
- ✦ **System Administrator Perspective** – needs a system that accommodates real-time access. Since the help desk is a business critical operation, the system administrator is responsible for the consequences of any delays caused by the overhead of system administration; the system administrator needs a reliable, scalable system to support a broad range of support inquiries.
- ✦ **Manager Perspective** – needs top-quality service for customers coupled with reasonable cost; a system that is quickly deployed and easily used by all of the parties above, as well as the tools to access current and historical activities, trends and results. The manager also wants 'triggers', such as escalation and advanced notification, so that emergency and high-level problems get immediate attention.

Meeting the Challenge: e11 from SHTR Consulting Group (SCG)

Representatives, team members and managers are increasingly playing the roles of salesperson, marketer, and customer service representatives and service center combines sales, marketing, and service information. This arose the need to give a hybrid approach to gives representative the power to up sell and cross sell, and to address customers, prospects, and partners with targeted marketing campaigns. e11 is an web based CRM solution, based on the notion of Customer Centered Service, which helps organizations add a range of web-enabled customer touch points to their existing interaction channels. An integrated, evolutionary approach to customer response management, it leverages the power of existing resources while providing a clear path to a future in which the customer plays an increasingly important role.

e11 can be used in single or multiple location environments for internal and external users and groups worldwide. e11 is fully customized to meet individual and organization-wide requirements for companies ranging from small organizations to mid-sized organizations, as well as departments within large corporate enterprises.

e11 Architecture: Building a Unified Approach

e11 is a state-of-the-art product for CRM. It is a true n-tier architecture designed to be scalable and open. The three tier are:

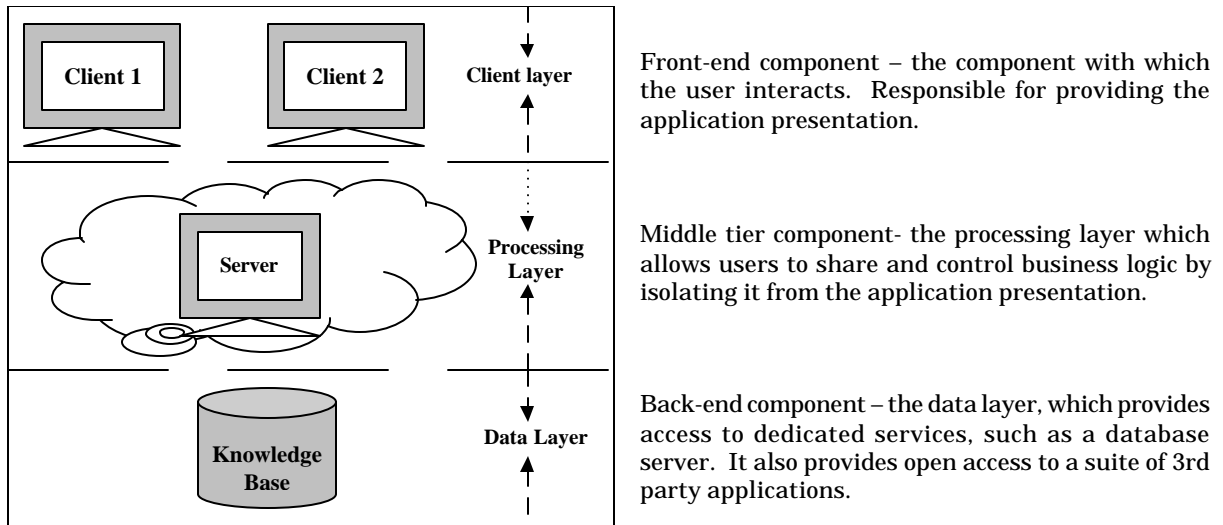


Figure 2: e11 Three Tier Architecture

e11 Framework

e11 makes it easier and more satisfying for customers to get in touch with the organization as well as make representatives more efficient and productive. It integrates with existing enterprise systems, can be customized according to organizational need and function, and can be deployed rapidly across the network. To make the

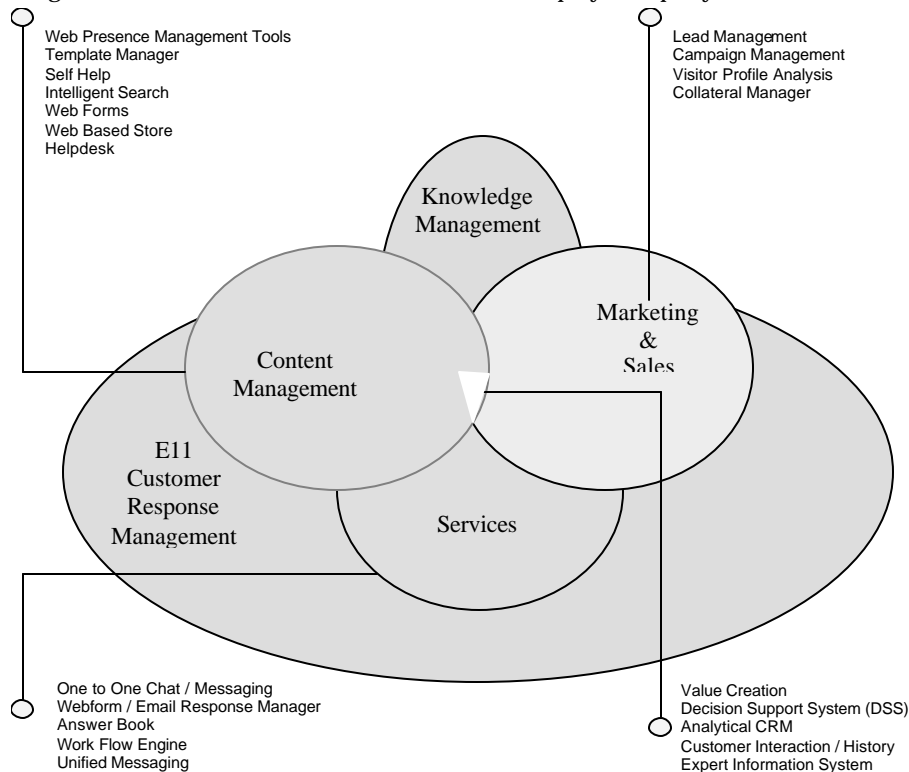


Figure 3: e11 Framework

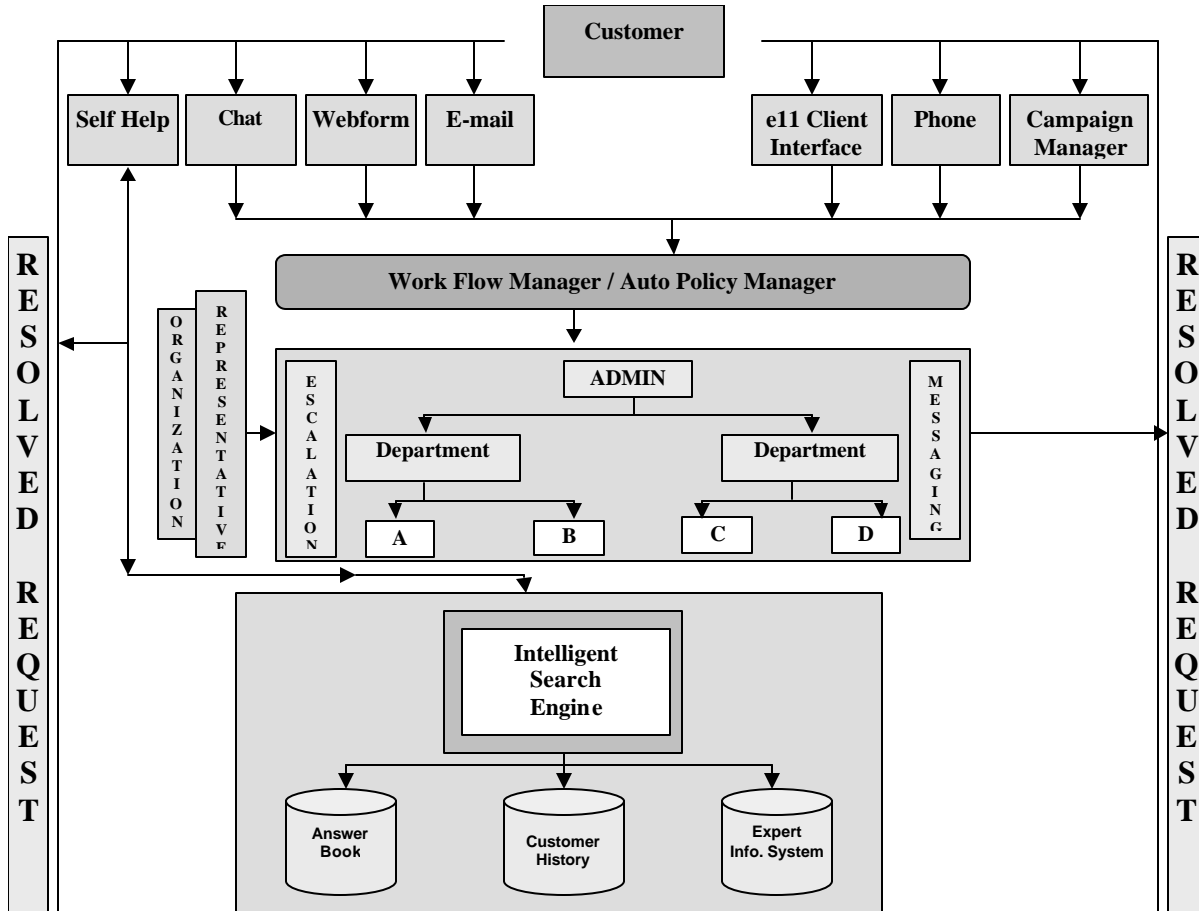


Figure 4: e11 Workflow

organization achieve a measurable return on IT investments, e11 can scale as operation grow and capable of integration with the next generation of software. Figure 3 shows relationship between the key components of e11 that gives a unified approach towards web based CRM and figure 4 shows workflow of these components.

Some of these components are explained further in this paper.

Self Help

E-mail, phone calls and chat interaction attract cost. e11 has the power to learn from customer's interactions. e11 becomes intelligent over a period of time and self help module prompts the user to resolve its request. By filling out an HTML form to "ask" the knowledge base for a solution, the end user can eliminate the need to involve the customer representative at all.

e11 self help endeavors to give best possible answer based upon:

- ✍ Query
- ✍ Page View Record (Behavior Analysis)
- ✍ Customer Preferences and Profile (In case of a repeat visitor)
- ✍ Earlier resolved request based on the similar query
- ✍ Guided Results based on organization's business objectives

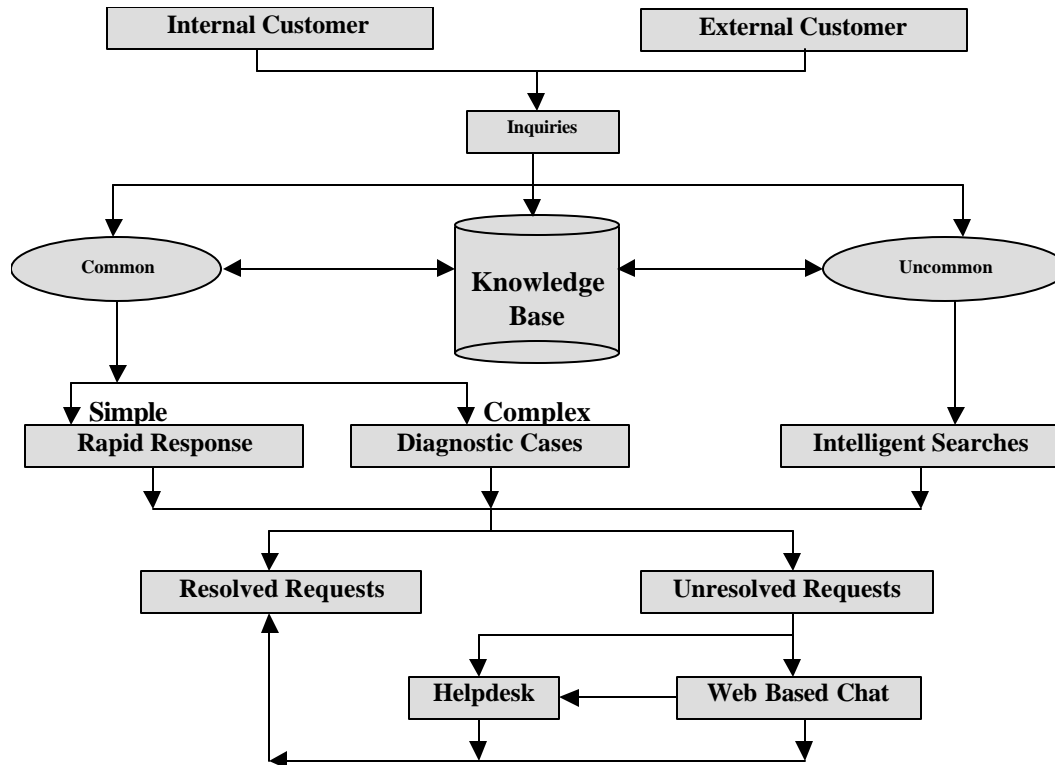


Figure 5: Self Help

Depending upon some or all of the factors mentioned above e11 self help response may consist of

- ∞ A single, succinct answer;
- ∞ A single answer with accompanying information displayed on a Web page;
- ∞ A web search result;
- ∞ Automatic or prompted escalation to higher support channel, such as chat, e-mail or query converted into email and routed to a representative.

e11 self help provides sophisticated customer intelligence capabilities that allow organizations to analyze conversations to better understand their customers. It effectively identifies important customer needs, interests, and trends, which is important for taking marketing, sales and customer support decisions.

One to One Chat and Messaging

e11 one-to-one chat and messaging is customer service tool for website and organization wide internal communication giving customers a virtual face-to-face experience. Some of the features are given below:

Text Chat – Web site visitors simply click a button on website or e-mail messages to instantly join a text chat.

Push Pages – Instantly sends visitors directly to the pages they are looking for.

Real Time Traffic Monitoring – Representatives have the ability to see visitors enter site, track what pages they visit, and proactively offer them help.

Pull – Proactively offer users help with the click of a button.

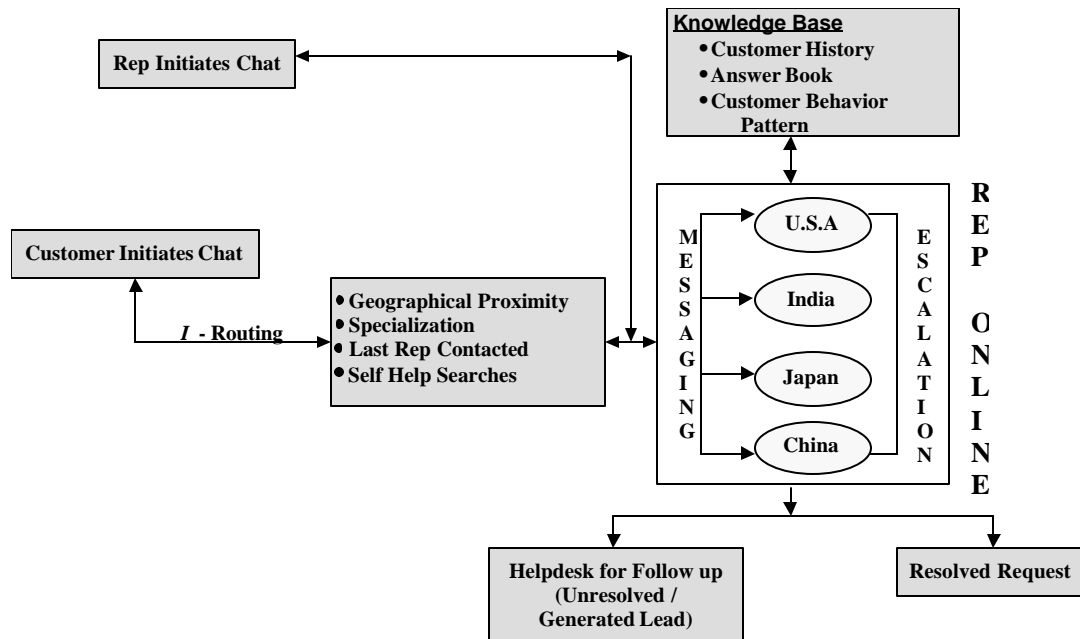


Figure 6: One to One Chat and Messaging

Workflow Manager – Divide representatives into categories allowing calls to be routed to the most appropriate person. Calls are intelligently routed based on group, status and call volume allowing representative to be used as efficiently as possible.

Answer Book – Saves time and ensure consistency by storing common responses for fast access. It includes HTML elements and formatting in text chats.

Messaging – Representative can either transfer a request or chat with any other representative or manager logged in, even if the representative is logged in from another office or a remote location.

Chat Transcripts – Review the transcripts of any chat that takes place on site.

Visitor Profile Analysis – Stores advance statistics information about both visitors and representatives.

Migrate – Migrate Chat scripts to e11 helpdesk.

Customer Request Manager

e11 provides organizations an industry-leading response management system for cost-effective processing to manage the flood of requests. It incorporates flexible routing rules to ensure that the right representative receives the inquiry, even in complex, distributed environments. Representatives have access to customer information profiles and a complete history of prior interactions. The main components of Customer Request Manager are:

Request Assignment and Routing

- ✍ Customer service requests can be automatically routed based on user configurable rules such as representative skills, last representative contacted, named representative, bulk group etc.
- ✍ Requests can also be manually assigned and reassigned or transferred.
- ✍ Work items associated with any request may be assigned or transferred to others, while maintaining the ownership of the request itself.

- ⌘ Round Robin – Each representative within a department receives an email in turn, one after another.
- ⌘ Load Balance – The incoming request goes to the representative who has the least number of open request.

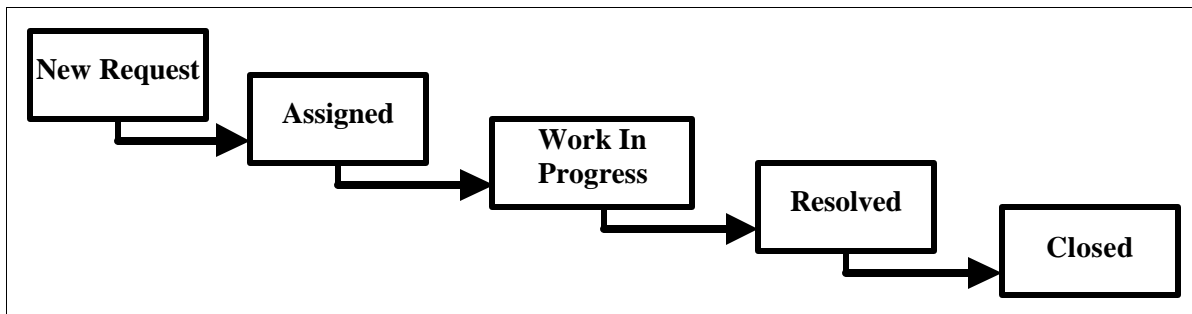


Figure 7: Five Step Resolution Process

Request Escalation

- ⌘ Automatically escalate service request based on business rules.
- ⌘ Manually select priority and status of a request and escalate to the next level.
- ⌘ Time based escalations based on service level agreements or warranty expiration.

Response Tracker

- ⌘ Customer “request for service” request creation and updating.
- ⌘ Get account and contact information for each request, create and edit them.
- ⌘ Create and track activities for each request, across media channel and individual representative.
- ⌘ View history for all requests open/closed against each contact.

Response Reporter

- ⌘ Select from a list of pre-configured reports to display the activities against a request, tracked through an account, a contact or a product.
- ⌘ Patterns of problem being reported.
- ⌘ Create new reports and categories.

Time Management Tools

- ⌘ Transfer tasks to other representatives or back to the group in case of scheduling conflicts.
- ⌘ List assigned activities for each representative either directly by the system based on their skill set/group or by their manager or those that the representative had previously scheduled for that day.
- ⌘ Sort through activities based on priority, account, contact, and channel usage.
- ⌘ Close or revisit tasks.
- ⌘ Take action based on configurable timers/alarms set for incoming requests (for particular dates or for time durations).
- ⌘ Display a reminder for a scheduled appointment.

Contact Management

- ⌘ Define new contacts from any screen.
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- ✍ Search for contacts based on account, service case etc.
- ✍ Track customer profiles based on demographics.
- ✍ Synchronize contacts with MS Outlook. Import contact information from many other contact manager.
- ✍ Maintain a log of all interactions across communications channels (phone, web, fax, email) against a contact for service call requests.
- ✍ Obtain contact activity history from the account or product perspective.

Knowledge Management

Unified Messaging

As interfaces with customers become multi-media (phone, email, web chat, messaging etc) the need for representative having consistent and integrated views of all conversations increase. The unified messaging queue integrates conversation instances for various mediums into a single indexed and filtered directory. Interactions with clients across medium are merged and viewed so that the service agents have all client history at their fingertips.

Answer Book and Document Management

Up to date documents are critical to the sales process. Whether it's a sales brochure, business form, product manual, parts diagram, purchase contract or even press releases and white papers – it's not always convenient or affordable for webmasters or agencies to put new documents on your website all the time.

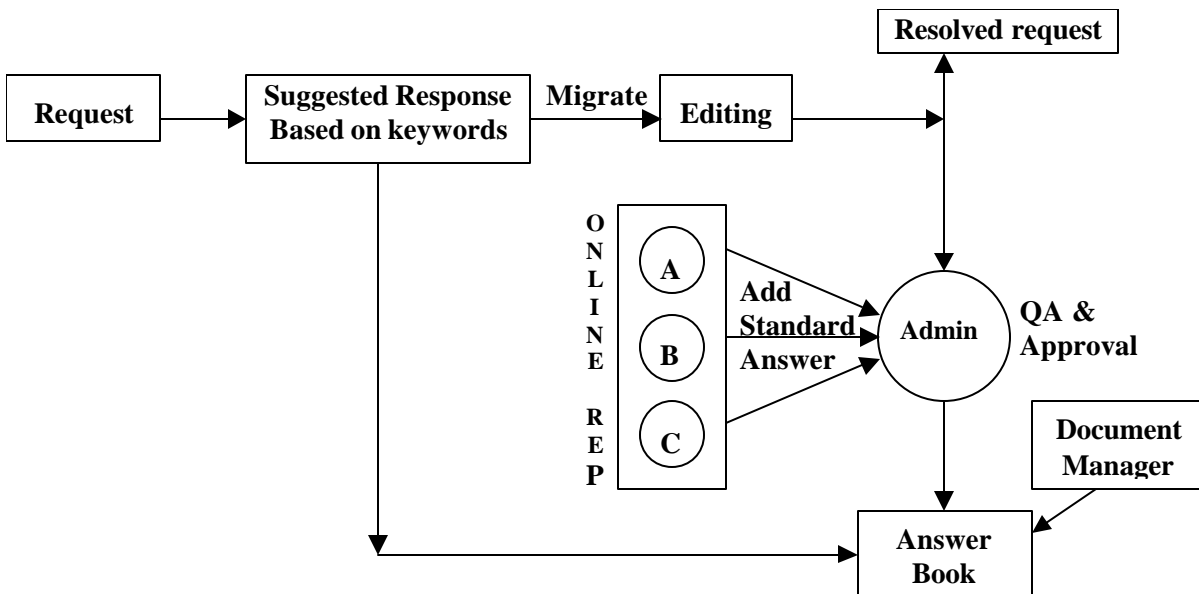


Figure 8: Answer Book and Document Management

The Document Library help organizations to lower costs and move the sales and service process faster. Documents can be uploaded in several formats: text, Word, PowerPoint, Excel and PDF files. Well drafted answers are stored in the document manager. e11's unique ability to edit and migrate answers gives representatives power to serve customers with a flashing speed. It helped some of the clients to reduce resolution time from approximately 20 hours to four minutes.

e 11 Case Study

Our client is one of the most reputed names in the travel trade and also owns a chain of luxury hotels spread across the country. Since their business is truly multi-locational in nature, effective and timely communication between their offices is critical to them to give their clients the desired quality of service. The unique nature of their business is that they service not only the end consumer directly approaching their multi locational offices but a major chunk of the business is directed to them by their business partners spread all across the globe. This requires them to not only coordinate their tour schedules with their business partners but also with their fulfillment service provider partners including Hotels, Resorts, Health Spa, Golf Courses etc. spread across the country.

So as the MD of the company put it "Communication is the life and blood of our business. If we can not respond to our customers' requests in time or if there is even a minor hiccup in their holiday schedules with its roots in communication folly at our end, we will have no place in this business."

As their business continued to expand, the number of daily customers enquiries also carried on increasing exponentially, leading to a situation where inspite of the best of the efforts of the customer support team, management found that the timeliness and the quality of customer interaction was beginning to get compromised. Further at a given point of time the customer had no way of finding out what his wait time in the queue of processing his request was likely to be.

One major challenge that the customer service representatives mentioned was the non existence of the integration of their internal communications systems with their workflows which lead to a lot of duplication of effort and outdated information being passed on to the end customers.

Our clients opted for the e11 helpdesk and self help modules which completely integrated their internal communication and workflow using the internet as a backbone for their company wide intranet but also provided single point interface for enquiries, request tracking, chat, messaging, self help etc.

This enabled them to make the giant leap from being a single shift customer service center to being a full-fledged 24 CRM center.

"For us e11 is a dream come true, with its single point customer interface, intelligent request routing, business logic engine and complete internal customer and workflow automation, it has not only completely transformed our service productivity levels but also lead the change of basic attitude towards services", gushes the Manager Outbound tourism.

And with the passage of time e11 has not only scaled up to meet their newer needs of end to end e-commerce but also helped them substantially cut their costs of internal communication. Most of the customers and business partners now interact with then using their website/partner extranet.

With the upcoming support for CTI in the next versions of e11 they are looking forward to all media integration. Truly an admirable success story for the stakeholders and e11!

Analytical CRM

Not everyone needs to be a statistician to get real knowledge from loads of data. End-user query and reporting tools, multi-dimensional analysis tools, and executive information systems (EIS) are a group of information access tools that are designed for business users. These Web-enabled tools, allow business analysts within the organization to analyze, report on, and distribute information with relative ease. This enables better decision throughout the organization. Following are various tools available in e11 business intelligence module:

1. Pre defined reports: e11 has more than 50 predefined reports like New Requests, Open Requests, Open Requests by Rep Names, Average Request Resolution Time, Average resolution time by rep names, Open Request by User Name, Open Request by email address (User), Daily Summary etc.

2. User Generated Reports: User can generate reports based upon the requirements and migrate them in a suitable format.
3. Graphical or statistical modeling tools: Predefined sales reports use graphical pie and bar charts.
4. 360 degree view- Search Console Engine: Multiple drill down facility for multi-dimensional views and analysis.

Workflow Manager

e11 graphical business process flow charting tool lets you quickly create business process rules customized to organization's needs. Workflows become part of organization's business workflow process and are automatically implemented by e11. Workflow editor is used to:

- ✍ Design replies or confirmations for web forms and email queries. e11 supports multiple e mail addresses and customized auto responder for each email address.
- ✍ Generate leads based on predefined campaigns and customer segmentation.
- ✍ Route customer requests based on representative or content or employee skills or customer history.
- ✍ Set timers or alarms to remind staff of important activities.
- ✍ Define escalation processes.
- ✍ Task reassignment.

Why e11

1. Ease of Use

The Gartner Group (2001), one of the world's leading analyst firms, recently reported that greater than 50% of all CRM solutions are failing to meet the implementation, ease of use and return on investment expectations of the customer. Surveys indicate that businesses have experienced implementation timeframes and learning curves that are longer than anticipated and that users are struggling to utilize overly complex applications.

e11, has been designed as an "out-of-the-box" ready to use solution for the end user. The product incorporates three key features that simply make it easier to use than other solutions.

- ✍ **Common User Interface** – Unlike other alternatives that have piecemealed together modules acquired from other vendors, e11 uses a common user interface throughout all applications. This significantly reduces the learning curve and user acceptance, making the product fun and easy to use.
- ✍ **Multi-view feature** – e11 is the only mid-market CRM solution that works the way you do. Using the concept of a "digital dashboard" the multi-view feature allows each employee to view information the way they want to see it. Even executives can view a daily snapshot of their business. See sales activity for the day, escalated service tickets, new leads, or forecast reports all with the click of your mouse. It's that easy with e11.
- ✍ **Customizability** – Business requirements can change overnight and your CRM solution must be able to change along with them. One of the key features that make e11 truly unique is the product's customizability. Incorporated along with the CRM applications is an underlying toolkit that provides complete capability for modification. Add or change fields, report views, or detail forms quickly and efficiently without programming knowledge.

2. Low Cost of Ownership

One of the most overlooked costs associated with CRM solutions is the cost of ownership, i.e. what will the system cost me to maintain, modify and upgrade to new features. e11 boasts the lowest cost of ownership of any product in its price point. e11 doesn't require a professional developer or system engineer to maintain.

Administration and maintainability of the system is profile driven and can be done by a database administrator or experienced end user. Annual support and maintenance is available for a fixed fee.

3. More effective cross-sell and up-sell

e11 Learns desires and habits of customers enabling organizations to accurately forecast needs of the customer. e11 enables organizations to predict future purchases, manage focused campaigns and deliver customized offers at the moment of opportunity. By anticipating what customers are likely to purchase cross selling and up selling becomes the “new” opportunity.

4. Higher responses to marketing campaigns

Many marketers accept single-digit response rates. No longer. e11 can change the entire way you market. With conversion rates greater than 20% and reducing individual marketing costs per contact.

5. Extraordinary service and support

Service is perhaps the ultimate way for a business to effectively differentiate itself. e11 enables organization to provide effective service that involves managing each customer interaction to ensure a consistent experience and an outcome that is in line with each individual customer’s wants, needs, and expectations—as well as being in line with the economics the business desires from a relationship with that customer.

6. Higher customer retention and loyalty

By some estimates, it can cost four to seven times more to replace a customer than it does to keep one. Recognizing the extraordinary costs associated with customer defections and the reciprocal benefits of loyalty, companies have seized on the issue of customer retention as a key objective in the coming years. As industry analysts such as the Gartner Group (2001) point out, some companies can increase profits by as much as 100% by retaining an additional 5% of their customers.

7. Higher customer profitability

While many companies have spent years in the dark about the profitability levels of individual customers, e11 enable companies to place a value on their customers. Such scores can be critical. Customer analysis helps executives determine which customers should be actively courted and which ones, if any, should be politely dropped.

8. More productive sales efforts

Investments in world-class selling software and capabilities promise to significantly enhance revenue per sales professional. Many companies already are witnessing impressive results. Sales teams work together better and the sales process is far more effective.

9. Fast Deployment

e11 is quick to deploy. Takes only 2 days to install after customization.

10. Security

e11 is a secure networked suite of applications with optional encryption, authentication, and authorization based on the RSA Secured Socket Layer (SSL). All application server services are securely available through firewalls via tunneling through HTTP or the SSL variant of HTTP (s), thereby, being able to protect data over a public network.

11. Scalable

e11 architecture unlimited scalability for all the objects that resides e11 powered web server. It also provides distributed object support. Additionally, it provides scalability by resource sharing, resource pooling and sophisticated clustering of presentation layer, application layer and other components. This underlying architecture enables the application to handle thousands of transactions per day and supports hundreds of users.

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