



Bridging the Gap between CRM and ERP- Your Post-Sale Service Delivery Strategy

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We routinely speak with many service delivery executives who have implemented an ERP and/or CRM solution believing they could also use this software to manage their entire post-sale service delivery process and discover this is just not the case.

Unfortunately, executives responsible for driving cost-efficiencies and increased profitability from post-sale service have recently been caught in the economic dilemma of escalating costs, decreasing profit margins on their products and increasing customer demand for better service. The lack of a comprehensive solutions specifically designed to manage the entire service delivery lifecycle forces a firm to either piece together a 'collaboration' of less than optimal point solutions to manage service functions or try to squeeze additional functionality from their CRM or ERP solutions. Many of these solutions were not designed to handle the specialized environment of post-sale service. Both approaches have come up short in delivering on the promise of seamless world-class service.

Some of the challenges created by trying to piece together a complete post sale service delivery solution using the above approach:

- Missed implementation/integration schedules as well as over budget due to too many disparate systems and levels of integration complexity with multiple systems and data bases.
- The need to log into multiple systems to manage your service delivery operations (According to a recent Technology Services Industry Association (TSIA) study, on average their member firms have to log into 13 disparate systems to manage their service delivery operation). See Desired State slide example below.
- Trying to manage specific service delivery functions with the "wrong" tools; e.g. ERP, which was intended to manage your inventory from a manufacturing perspective so it is not very efficient when it comes to managing your field inventory of parts or logistics.
- Traditionally, software applications for service delivery have focused on the transaction type and built the "entitlement engine" (T&C's of the contract) based on the transaction type. The resulting data model is not very flexible and requires hard coding to make changes to those T&C's of the contract.
- Often a company's business processes are not documented or are inadequate or 'broken' and the company will try to use software to fix the broken processes. Software alone can't fix processes and piecing together multiple systems usually magnifies the issues.

Thus the need for Service Relationship Management to fill the "gap" created by these off the shelf CRM & ERP solutions.



Below are some of these specific gaps companies have:

- Many companies have difficulty with their warranty and contracts management. They do not have an easy to understand, comprehensive view of their customers' entitlements. CSDP's SRM solution provides at-a-glance information on a customer's exact entitlement status, whether under-contract, under-warranty, or out-of-coverage. Your customer service and field services reps will have all contract and warranty data at their fingertips so they do not under-deliver or over-deliver to the terms of the contract or warranty. In fact, we build our software from an entitlement's perspective so that the transactions can be developed using the foundation of the terms and conditions of the contract. This allows maximum flexibility to develop and implement the terms and conditions of a contract.
- Tracking and managing customer support ticketing/help desk has also been identified as a typical gap. Companies need a system that handles all types of service requests via voice phone, web, email, IVR and electronic interface for your call center, help desk and service organization. CSDP's SRM solution provides this along with robust assignment logic to route requests to queues or individuals based on any data element of a Service Request or combination of data elements. Our sophisticated knowledge base and entitlement engine means you'll have all the information about each customer, their history and the history of their products/services to improve first call resolution.
- Dispatching of field technicians can also be a cumbersome process without the right service solution. CSDP's SRM solution focuses on ensuring that service technicians with the right skill set are properly dispatched the first time with the right information and parts, which is critical to both customer satisfaction and service profitability. Our mobility solutions give field technicians real-time access to critical service data 24x7 and allow them to complete transactions while on-site.
- RMA and depot repair is also not typically managed well by traditional CRM or ERP solutions. CSDP's SRM solution improves inventory and parts management and operational efficiencies when delivering services. The solution provides in-depth, real-time visibility into demand, supply, and inventory costs. With a clear view of the stocking levels of materials, your returns management and depot repair centers gain a competitive advantage.
- To identify incomplete or broken processes, CSDP provides Business Process Mapping to identify, document and analyze current processes. The analysis takes into account the objectives of the company and service delivery operation, the actual work being completed and the impact the processes have on the end customer to help align processes with your business objectives.

For more information, go to CSDP's White Paper, [Square Peg. Round hole. It's Not Going to Work. Service Relationship Management: Bridging the gap between CRM and ERP](#), or learn more about our [solutions](#).

