



# Square peg. Round hole. It's not going to work.

**Service Relationship Management:  
Bridging the gap between CRM and ERP.**

Authored by: David Dorret



## The myth of one-size-fits-all...

Traditionally both Customer Relationship Management (CRM) and Enterprise Resource Planning (ERP) have been billed as one-stop solutions. Organizations have spent thousands upon thousands of dollars investing in and implementing their new solution only to find, that when it comes to the service process, CRMs and ERPs are the proverbial square peg in a round hole.

CRM products are designed to track and predict sales, focusing mainly on the pre-sale-to-order process, while ERP solutions help coordinate your internal systems, from manufacturing to finances to engineering. Many times, these solutions are a series of siloed software packages designed to handle a specific departmental need.

But service is a whole new ballgame.

Why? Because service organizations and departments are inherently complex, distinctive entities. Labor and materials costs must be tightly controlled and every aspect of the service process needs to be analyzed with a micrometer. Service transactions are dynamic and companies must be incredibly nimble, to be able to respond to customers quickly and effectively.

---

## What's Service Relationship Management?

[Service Relationship Management \(SRM\) ©](#) bridges the gap between CRM and ERP. It's a "big picture" approach to service that considers each aspect of the end-to-end service delivery lifecycle. Traditionally service is seen as a cost center, but the SRM © model embraces the concept of service as a relationship and a revenue generator.

SRM © software is a process-centric approach for greater service agility. It is specifically designed to enhance and extend CRM and/or ERP systems, and help companies realize the ROI of their investment more quickly.

---

## 24/7 Service

In today's connected world, service is expected to be 24/7. Yet, many CRMs and ERPs are based upon a 9-to-5 world, with maintenance and reorgs performed off-hours. However, time-to-resolution and time-to-respond are critical factors in customer retention and satisfaction. Yet, retooling an existing CRM system is prohibitive at best. An SRM © solution looks at service from a customer's point of view. Database-agnostic, the SRM © software works with existing infrastructures enabling voice phone, web, email, IVR and electronic interface service requests to be managed, around the clock. The end result? Clients get service when they need it the most.



---

## Precise tracking of Costs

Service costs – often one of the highest within a company – must be tracked to the fraction of a penny. CRMs and ERPs are not equipped to track a single service repair from end-to-end, with full historical cost tracking, including returns, inventory, labor, warranty reimbursements, serial and non-serial parts and reclaimed hazardous materials. An SRM © solution allows companies to accurately monitor technician times as well as stock on service trucks or at multiple locations across the organization.

---

## Productivity

CRMs and ERPs are simply not designed to manage the post-sale service process, including multiple technicians on a single job, workload and technician skill balancing, and coordinating with third parties. They aren't designed to assist in automating the service process or taking proactive measures for future service updates. Because service is highly complex, the unfortunate result is downtime, over or under-staffing and missed opportunities. An SRM © solution boosts productivity by enabling automated service requests. It allows managers to match employee skill levels with the task required and staff with the number of service requests, reducing overstaffing.

---

## Case Study

### Transforming customer service & response times

A leading, high-tech organization's challenge was to reduce inventory and service costs while not just maintaining, but improving customer satisfaction levels. The company had approximately 700 frontline tech support personnel at the contact center as well as over 7,000 field technicians. They received over 10,000 customer requests per week, but approximately 40% of the time, there were delays due to unavailable parts and there was often the need for multiple customer interactions before the service work was completed.

CSDP implemented an SRM © solution for the company's existing CRM. This solution allowed the contact agents, field technicians, and inventory managers to tap into a central knowledge base in order to better coordinate activities, access repair history and technical guides, and more effectively automate the service process. Phase 1 was implemented ahead of schedule and came in at 29% under budget.

As a result, not only is their service now more proactive, but the SRM © solution also increased the first-call resolution rate by 23%. This improvement eliminated the need to dispatch field personnel for those calls. In addition, where the client has specified that their software can only be down for 15 minutes, stock and inventory levels can be controlled to the point where it is possible to arrange for inventory to be available in multiple locations around the world for one critical service job. The average cost per repair per transaction was reduced by 54%. After parts inventory and skill alignments we implemented, customer satisfaction went up 3 points and the company significantly reduced its service-related operational costs from the reduction of labor costs, overstocks, and non-authorized repair costs.

"We were able to respond to our customers in record time and yet reduce overstocks, materials, labor costs – all while improving customer service satisfaction." – VP of Operations



## About CSDP

CSDP offers flexible, agile solutions to unify infrastructure and transform cost centers into profit drivers resulting in greater customer service and market share. Our services-led software is fully customized to fit your company's needs and is respectful of existing infrastructure so that it implements quickly and begins generating ROI immediately!

CSDP's clients have realized a 20% decrease in IT/infrastructure costs, reduced labor costs by 15%, and improved customer satisfaction by up to 15 points. We not only help our clients drive down operating and service delivery costs, but enable them to drive up customer satisfaction and increase revenue and market share!

CSDP is a services-led software company with a tailored suite of Service Relationship Management (SRM) © process tools. We offer service providers and product manufacturers in any industry an affordable way to increase efficiencies, reduce costs and enable cost centers to become profit contributors. The SRM © solution ties together CRM and ERP by addressing both service objectives and business processes. CSDP's SRM © software solution has been delivered to some of the world's foremost Fortune 500 companies to include IBM, Xerox, Fujitsu, Whirlpool, Rockwell, and BOA just to name a few.

Visit our [website](#), follow our [blog](#), and join the [Service Relationship Management © 3.0 group](#) on LinkedIn.

To learn more about CSDP's SRM © Transformation solutions email us at [info@csdpcorp.com](mailto:info@csdpcorp.com) or call Jerry Edinger at 888-741-2737 X 101 to learn more.

CSDP Corporation  
15615 Alton Parkway, Suite 310  
Irvine, CA 92618