

Best Practices Series

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knowledge management

in CUSTOMER
RELATIONSHIP
MANAGEMENT

Business Objects

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CRM Magazine Best Practices Series:

CAPITALIZING ON Knowledge Management IN CRM

Amazing efficiencies have been realized in many of the processes making up customer relationship management solutions. Of course, all that call routing speed and those multiple channel contact points will eventually cause incoming customer inquiries to pile up into a logjam unless effective knowledge management processes are imbedded deeply into the solution. Delivering effective customer service is all about answering questions quickly and efficiently.

In the following pages of this section, five leading vendors offer their insights into how to capitalize on knowledge management strategies and practices in your customer relationship management initiatives. Not surprisingly, the insight they offer has very little to do with technology but instead concentrates on the larger questions on project scope, best practices, and creating a knowledge management solution that is adaptable and dynamic.

Sometimes a broad topic like this seems daunting to everyone except those deep pocketed companies at the end of the revenue spectrum, but I think that you will find that the information proffered can especially be of value to readers in the small/medium arena as well.

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Best Practices for Combining Business Intelligence and CRM

Delivering Clarity to Knowledge Management

Knowledge, understanding, insight, enlightenment.

Knowledge in its many forms is critical to success in today's competitive environment. And critical to the success of the knowledge creation process is business intelligence (BI).

Knowledge management is focused on leveraging and sharing knowledge using technology to facilitate the process. BI software enables organizations to transform data into useful and meaningful information that can be shared with those who need it to make more informed decisions.

Business intelligence delivers what key stakeholders—including sales, sales management, marketing, finance, and executives—are increasingly demanding: information that is delivered in precise, accurate, and understandable terms.

A 2006 Gartner survey of CIOs with CRM investments found that the number one application business area targeted for spending in 2007 was performance management, BI, and analytic tools to

transform their transactional data into information that would help business performance. A 2007 sales performance study by CSO Insights revealed that almost 65% of CRM users plan to enhance their CRM applications with sales process integration and sales management analytics.

As organizations rush to adopt or increase their footprint in BI, however, they should be cognizant of the best practices—and potential pitfalls—that could make the difference between BI clarity and confusion.

BEST PRACTICE: **DEFINE SHORT- AND LONG-TERM GOALS FOR YOUR BI IMPLEMENTATION.**

Know what you need now and plan for your needs in the future. While you may only require certain reporting functionality to start, once users have been exposed to the benefits of business intelligence, demand increases for broader and deeper analytical capabilities such as query and analysis, dashboards, and scorecards, information management, and performance

management solutions. Evaluate BI vendors for their breadth and depth of offerings as well as the ease with which they can expand the solution to meet your future requirements.

BEST PRACTICE: **EMPLOY AN EFFECTIVE PROCESS IN SELECTING A BI VENDOR.**

According to Gartner¹, one of the primary reasons for BI project failures is an ineffective process when selecting a service provider. When evaluating

BI vendors, scrutinize their history for reliability and stability. Select a vendor with a proven track record, extensive experience with organizations of all sizes, and successful growth both in revenues and capabilities. Choose a vendor that's large enough to retain its independence and is likely to survive in an increasingly competitive market.

A BI vendor with strong partner network—both in software vendors and consultants—will also prove invaluable. Vendors with a strong base of consulting partners make it easier to find outside expertise should your organization have special requirements down the line. BI vendors that hold strong partnerships with leading CRM providers such as Salesforce.com will deliver solutions that are already integrated and optimized for use on your CRM platform.

BEST PRACTICE: **ENSURE DECISION MAKERS HAVE ACCESS TO ACCURATE AND TIMELY INFORMATION NEEDED TO DRIVE THE BUSINESS.**

In the past, real-time access to reports and dashboards has only been available to enterprises that could afford to purchase and manage a large-scale BI solution. For organizations unable to divert internal resources to support enterprise level solutions, the alternative has been ad-hoc information delivered via static files over email or hard copy. Unmanaged, unstructured, and unsecured, these solutions have been inconvenient, time-consuming, and unwieldy for the report authors and decision makers who rely on the data. Today's on-demand business intelligence solutions ensure that companies of all sizes can instantly, simply, and securely distribute the accurate and timely information needed by decision makers, without the need for IT resources or capital budgets.





BUSINESS INTELLIGENCE COMBINED WITH CRM HELPS DELIVER COMPLETE INSIGHT INTO YOUR BUSINESS, ENABLING KNOWLEDGE WORKERS AT ALL LEVELS OF YOUR ORGANIZATION TO MAKE FASTER, MORE INFORMED DECISIONS.

**BEST PRACTICE:
EVALUATE ON-DEMAND BUSINESS INTELLIGENCE OFFERINGS AS AN ALTERNATIVE TO TRADITIONAL ON-PREMISE SOFTWARE.**

As with other on-demand or software-as-a-service (SaaS) offerings, BI on demand can deliver the functionality and power of on-premise reporting and analytics combined with the ease-of-use, ease-of-implementation and administration, and cost-efficiencies that have made on-demand services so popular. With an on-demand solution, such as crystalreports.com, Business Objects OnDemand, and Information OnDemand, you can give insight to customers and partners immediately, without an IT project.

RapidAdvance, a leading direct provider of cash advance services for small and mid-sized businesses, uses Salesforce.com as its CRM tool for end users ranging from internal sales teams to executives to partners. With virtually no IT department or resources to call on, RapidAdvance evaluated all its options and chose Crystal Reports and crystalreports.com to access, report, and share its company data, which included Salesforce.com. "Crystal gave us the breadth and depth of reporting that other solutions we looked at couldn't deliver, including Salesforce.com itself. I downloaded the free trial of crystalreports.com and found it unbelievably easy to work with," says Scott Cohenford, Senior Analyst at RapidAdvance. "A major feature in crystalreports.com is its direct integration into the Salesforce.com interface. All Salesforce users are in the application every day as part of their daily routine. All they have to do is click on a tab and they have all the reports they need, instantly. Business Objects provides a complete on-demand solution that allows us to continue growing our BI strategy as we grow our business."

**BEST PRACTICE:
ENSURE PROVEN COMPATIBILITY WITH YOUR EXISTING CRM SYSTEM, ENTERPRISE APPLICATIONS, AND DATA SOURCES.**

To maximize your CRM investments and fully leverage your knowledge

management, ensure that any BI solutions you implement will work seamlessly and efficiently with your existing CRM systems. Whether you have on-demand CRM from Salesforce.com or on-premise solutions such as Siebel, Microsoft, PeopleSoft, or SAP, make sure that the BI solutions have proven, effective integration that will result in a smooth, pain-free deployment and fast time to results.

Also investigate the BI vendor's ability to work with a wide variety of data sources. Although many companies initially run reports against individual systems like Salesforce.com, it's likely that, over time, your organization will deploy BI against additional systems and databases or that you will need to access data from several sources to see the total picture. By ensuring that your BI vendor can report from large or disparate data sets, you can also avoid the painstaking and time-consuming process of manually combining data.

**BEST PRACTICE:
EVALUATE YOUR NEEDS FOR SCALABILITY, FLEXIBLE PRICING, AND PERFORMANCE RELIABILITY.**

If the utmost in flexibility and scalability—up or down—is desired, then the attractiveness of an on-demand BI option becomes even greater. One key advantage of on-demand solutions is that they can be adopted in an incremental fashion. This permits companies to test SaaS solutions in pilot situations, or add new users or application modules on an "as needed" basis. An on-demand application should be able to accommodate an increasing number of users to grow with a company's needs and offer flexible monthly subscription pricing to fit your budget requirements.

Because companies continuously rely on their BI solutions to make both strategic and tactical decisions, the on-demand service must be available 24x7. Carefully review the SaaS vendor's uptime performance records, service delivery infrastructure capabilities,

hosting company relationships, and service level agreements (SLAs).

**BEST PRACTICE:
ENSURE STATE OF THE ART SECURITY PROTOCOLS ARE IN EFFECT.**

Given the sensitive nature of the data and analysis captured by a business intelligence application, it is critical that companies carefully examine the security measures that the solution vendors have adopted to protect their proprietary information, particularly if you are deploying an on-demand solution. Encryption and other technical safeguards should be in place, as well as SAS 70 certification to assure that the vendor has the proper policies and procedures to protect its customers' valuable data. Within the tool, you should also be able to specify permissions and user profiles to ensure that users receive only the reports relevant to their needs.

Business intelligence combined with CRM helps deliver complete insight into your business, enabling knowledge workers at all levels of your organization to make faster, more informed decisions. It allows you to combine marketing data, leads, opportunity data, and now even external market data into a single, comprehensive report or analytic. Decision makers will be able to see the complete picture of business performance, often in real time, and make decisions that will truly impact competitive advantage. ■

Business Objects is the world's leading BI software company, transforming the way the world works through intelligent information. Business Objects is also the clear leader in on-demand business intelligence with its full suite of SaaS offerings: crystalreports.com, crystalreports.com for salesforce.com, Business Intelligence OnDemand and Information OnDemand. To learn more and experience free trials, visit www.ondemand.com or www.crystalreports.com.