



## *Noble Software Consulting* *SAP Training*

### **SAP - mySAP CRM 4.0 – SALES & MARKETING MODULE** **OVERVIEW**

*The course mySAP CRM 4.0 Overview will introduce the student to Customer Relationship Management, and introduce him to the most important features of mySAP CRM . The trainee will be introduced to the procedure for creating a follow-up activity to an activity in the Customer Interaction Centre.*

#### **Learn :**

- *CRM and the mySAP CRM System.*
- *Customer Relationship Management.*
- *Example Scenarios from mySAP CRM.*
- *mySAP CRM User Basics.*
- *mySAP CRM Architecture.*
- *mySAP CRM Applications.*
- *Customer Interaction Centre.*
- *Sales Component.*
- *Service Component.*
- *Marketing Management.*
- *Further Topics.*

#### **Audience**

*The course is intended for those who need to acquire knowledge about Customer Relationship Management, and mySAP CRM in particular. It is intended for end-users as well User Support and Project Team members. Participants should have basic knowledge of Windows or other graphical user interfaces (GUI).*

# **SAP - CRM COURSE SALES & MARKETING MODULE**

## **OUTLINE – 60 HRS**

### **Unit 1: CRM and the mySAP CRM System**

- Customer Relationship Management.
- What is CRM? • mySAP CRM.
- Example Scenarios from mySAP CRM.
- Personal Contact.
- Contact by Telephone.
- Internet / B2C.
- Internet / B2B.
- mySAP CRM Navigation.
- Business Partners.
- Products and Product Catalogues.
- mySAP CRM Organisational Model.
- Business Transactions.
- Campaign Management.
- mySAP CRM Architecture.
- mySAP CRM Architecture: Technical View.

### **Unit 2: mySAP CRM Applications**

- Customer Interaction Centre.
- CIC - Overview and Functions.
- Sales Component.
- Sales - Overview.
- Telesales.
- Internet Sales.
- Internet Customer Self Service.
- Marketing Management.
- Marketing Planning and Campaign Management.
- Segmenting Target Groups.
- Planning and Performing Campaigns.
- Lead Management.
- Personalization.
- Analysing Campaigns.
- Further Topics.

### **Overview and Introduction to CRM**

- Introduction to CRM
- General SAP Transactions
- Foundation & Architecture of mySAP CRM
- Overview of CRM server Technology and User Interface
- Business Partners

- Organizational Model

### **CRM Base Customizing**

- Territory Management
- Product master
- Business Transaction Processing
- Activity Management
- Partner Processing

### **CRM Base Customizing**

- Actions
- Overview of Pricing in CRM
- CRM Billing Overview

### **CRM Interaction Center (Win Client)**

- Interaction Center Overview
- Architecture landscape
- Win Client Profile
- Configuring Components
- Action Box and alert molder
- Interaction center scripting

### **CRM Sales**

- Opportunity Management
- Copy Control
- Quotation and Order Management
- Overview Contract Management

### **Marketing**

- Overview of marketing management in mySAP CRM
- Marketing and campaign planning
  - Planning and performing marketing projects
  - Marketing Calendar
- Personalized mail forms
  - Creating personalized e-mails
  - Business partner-controlled communication
- Segmenting business partners
  - Marketing attributes

- Segment Builder
- Creating profiles and target groups
- Lead Management
- Campaign automation

External List Management.

## **What is CRM??**

**CRM** stands for **Customer Relationship Management**. It is a process or methodology used to learn more about customers' needs and behaviors in order to develop stronger relationships with them. There are many technological components to CRM, but thinking about CRM in primarily technological terms is a mistake. The more useful way to think about CRM is as a process that will help bring together lots of pieces of information about customers, sales, marketing effectiveness, responsiveness and market trends.

**CRM** helps businesses use technology and human resources to gain insight into the behavior of customers and the value of those customers.

### **Why does Companies/ Industries implement CRM ??**

#### **Business Benefits**

- Effective CRM software enables sales reps, service reps, administrative staff, and often, accounting and executive personnel, to do their job better, faster, and with less wasted paper and time
- Prospects can be followed up quickly, and sales reps have instant access to the exact data needed for effective closing
- Marketing can be analyzed for workability and improved to create the highest return possible on the marketing dollar
- In service, customers can be handled rapidly, and the exact nature of a problem can be quickly located and handled
- The right CRM solution enables data to flow easily and quickly within an organization, and in most cases includes the entire organization
- The net result is higher sales, happier customers and a much improved bottom line
- The reduction in costs due to improved personnel productivity, better sales follow up, improved marketing and service, and an overall impressive growth in general organizational efficiency sometimes produces almost immediate economic benefits

## More Info on SAP CRM

### SAP CRM

With the most comprehensive and flexible customer relationship management (CRM) offering on the market today, SAP is setting a new standard for the way companies interact with their customers and partners. Addressing the strategic needs for CRM in more than 25 industries, SAP is helping companies like yours make the most of relationships with customers by capitalizing on customer insight; improving front-line efficiency and effectiveness; streamlining critical business processes across and beyond customer touch points; and adapting quickly to changing business and customer needs.

#### **CRM Without Compromise: Simple, Flexible, Comprehensive**

SAP's unique approach to CRM meets organizational needs for rapid adoption and user productivity; quick time to value; and seamless, best-practice operations across both the front and back office. Avoiding typical trade-offs, SAP's "CRM Without Compromise" combines the speed, flexibility and depth organizations need to be successful in today's marketplace and in the future.

- Enable your organization to become truly customer-centric, with the most comprehensive support for end-to-end processes and the most powerful front-office capabilities for all interaction channels across marketing, sales and service.
- Act immediately and grow strategically as your business needs evolve. You can start fast with easy-to-use, on-demand solutions and then move to an industry-specific, strategic CRM on-premise deployment without the disruption of switching technologies or vendors.
- Empower your employees to best serve the customer and drive user adoption with a simple, intuitive Web-based interface, specifically designed for business users.

#### **Managing Today's Business Challenges**

In today's market it is increasingly difficult to base your company's success on operational efficiency alone. To successfully protect and grow your business, you need to invest in customer relationships and seek new ways to improve upon your ability to win and keep your most valuable customers. Gaining customer insight and implementing customer-centric business strategies to increase customer loyalty and customer satisfaction are imperative to secure sustainable growth. Well-designed sales channels and service processes become important sources of differentiation, especially if they are connected to other critical business functions in your organization. Successful companies continuously design and improve entire business processes across and beyond customer touch points to create and deliver superior customer value, providing a consistent and exceptional customer experience across all customer interaction channels.

## **End-To-End Business Value – Out of the Box**

The SAP tradition of leadership in business software continues with a new generation of CRM applications, providing your company with unprecedented capabilities and increasing your bottom line by improving your customer relationships. With preconfigured support for 280 business processes, SAP CRM helps your company manage all customer-related business processes throughout your entire value chain – from initial customer contact through shipping and payment.

In conjunction with the SAP Business Suite, SAP CRM enables business process integration that is unrivaled in the industry:

- Get a complete picture of your customer with real-time access to order, return and payment history, profitability analysis and credit information, and turn this insight into frontline action to better identify sales opportunities, reduce business risks, tailor product offerings, target marketing messages and optimize service levels.
- Synchronize your supply and demand chain, online transactions and fulfillment, service requests and spare parts logistics, promotion planning and inventory management, customer insight and product innovation as well as sales forecasting and financial planning with unique out-of-the box integration.

Seamless integration of data and processes is key to operational excellence. But this cannot be achieved if it is not delivered out of the box. Companies have tried and were forced to realize that they fell far short of their goals – after lengthy and costly integration projects.

### **Marketing**

Align marketing processes and drive customer demand using functionality to improve marketing resource management, segment and list management, campaign management, lead management, trade promotion management and marketing analytics.

### **Sales**

Maintain focus on productive activities to acquire, grow and retain profitable relationships with functionality for sales planning and forecasting, and the management of territories, accounts, contacts, activities, opportunities, quotations, orders, product configuration, pricing, billing and contracts.

### **Service**

Drive service revenue and profitability of your call center, field service organization and online self-services. Manage service orders, contracts, complaints and returns, in-house

and depot repairs, warranties and resource planning more effectively and efficiently.

## Interaction Center

Increase customer loyalty and drive revenue by transforming your interaction center into a strategic delivery channel for marketing, sales and service activities across multiple contact channels. Effectively manage your interaction center and improve performance while reducing the cost of operations.

## Web Channel

Turn the Internet into a profitable sales and interaction channel for business customers and consumers. Use the Web to reach out to new customers, increase sales and improve customer convenience while taking advantage of the efficiency of the Web channel.

## Partner Channel Management

Drive indirect revenue and boost channel performance by effectively managing, enabling and incenting your channel partners. Leverage channel insight and streamline critical business processes across your entire partner network to improve partner relationships and increase channel effectiveness while reducing channel support costs.

Marketing	E-Commerce	Channel Management	Marketing Resource Management		Segmentation & List Management		Campaign Management		Trade Promotion Management		Lead Management		Analytics Across Models
			Sales Planning & Forecasting	Territory Management	Accounts & Contacts	Opportunity Management	Quotation & Order Management	Pricing & Contracts	Incentive & Commission Management	Time & Travel			
Sales			Service Order Management	Service Contract Management	Complaints & Returns	In-House Repair	Case Management	Installed Base Management	Warranty Management	Resource Planning			
Service													

Figure 1: Support for Key Business Processes Across Your Enterprise

## The Solution That Evolves With Your Business

Drawing on more than 30 years of experience, SAP has created a unique approach to CRM that lets you choose the right solution to meet your business needs – and that grows with your business as your needs evolve. Only SAP provides an on-demand option that can be transitioned seamlessly to a strategic, on-premise deployment without disruption to your daily business – because our on-demand solutions have the same user interface and share common functionality. With SAP CRM on-demand solutions, your organization can react immediately to changing market conditions with a fast-to-deploy, pay-as-you-go solution.

Regardless of what CRM solution you are currently using, you can easily adopt SAP CRM. Its modularity and flexibility allow you to implement additional solutions and enhancements incrementally. Whether you need organization wide solutions that will

grow along with your business, or simply want to standardize your current IT environment, this approach protects your existing IT investments and can result in considerable savings.

SAP® software for CRM is powered by SAP NetWeaver®, a platform that allows you to reduce IT complexity and obtain more business value from your IT investments by aligning IT with your business strategies. SAP NetWeaver provides the best way to integrate all systems running SAP or non-SAP software. As the foundation for entSAPrise service oriented architecture (entSAPrise SOA), SAP NetWeaver allows you to compose and enhance business solutions rapidly using entSAPrise services and turn your current IT landscape into a strategic environment that drives business change.

### **For Now and the Future**

SAP CRM provides the comprehensive functionality you need to support all customer-facing lines of business across marketing, sales and service, and through all customer interaction channels. As an integral component of the SAP Business Suite, it also enables you to access critical back-end data (such as order, credit and profitability information) and take advantage of built-in business process integration.

SAP CRM on-demand solutions deliver a fast, Web-based platform that enables quick benefits and supports your evolving business needs.

The functionality that SAP CRM solutions provide today is only the beginning. SAP is committed to continual innovation and enhancement of its CRM offerings to ensure that they remain the ideal choices for organizations like yours that must drive new growth, maintain competitive agility and attain operational excellence.

