

## Solution Brief

SAP Customer Relationship Management

Your sales team must acquire and cultivate profitable customer relationships to succeed. To do so, sales professionals must use their time efficiently and act effectively. For direct sales – whether online or offline – the SAP® Customer Relationship Management application equips your team for top performance.



# SALES

## MAXIMIZE PROFITABILITY, IMPROVE PERFORMANCE, AND DELIVER CUSTOMER VALUE

Effective sales organizations do more than just meet revenue goals. They find new ways to achieve their goals while ensuring their sales professionals maintain focus on activities that foster profitable customer relationships. They identify which activities move opportunities through the sales cycle and which do not. They apply resources to areas where they can be most effective. They minimize driving time and maximize face time with their most valuable customers. They assign high-value accounts to top-performing sales professionals and define territories based on the same considerations.

The SAP® Customer Relationship Management (SAP CRM) application supports these and other sales activities for organizations in all industries, of all sizes, and across all sales channels. It equips your sales professionals with the tools and information they need to plan, execute, and analyze sales operations throughout the sales cycle. It helps you find new ways to accelerate buying decisions, uncover new areas of revenue potential, and implement new methods to improve sales productivity.

### Grow Your Business Empower Your Team

#### Sales Planning and Forecasting

Most sales organizations find it difficult to accurately predict future revenue. By providing a complete picture of projected revenue and anticipated sales volume over time, SAP CRM increases the accuracy of demand plans and sales forecasts. You can view forecasted revenue by attribute, using a variety

of parameter-driven chart and reporting options for a complete view of future revenue commitments.

#### Territory Management

The appropriate assignment of sales resources and balanced workload across well-defined territories is the key to peak efficiency in any sales organization. With SAP CRM, you can structure your sales team according to territories and assign sales professionals to the appropriate territories using a variety of attributes, including company size, revenue, geography, product, product line, and strategic account.

#### Account and Contact Management

SAP CRM provides a single, comprehensive view of all information necessary to manage your sales accounts, keeping everyone on the same page. You can capture, monitor, and track all critical information about prospects, customers, and partners. Your sales people have at-a-glance visibility into key contacts, critical relationships, detailed customer profiles, the up-to-date status of all recent transactions, and a complete history of each account.

#### Activity Management

Through its activity management functionality, SAP CRM focuses the collective energy of your sales team on the actions proven to promote profitable business. It fosters efficient team collaboration and helps keep your sales professionals concentrated on activities that develop loyal and profitable customer relationships. By providing complete visibility into all sales activities, SAP

CRM allows sales professionals to track critical customer interactions and maintain all business contact information, e-mail interactions, and calendar and task entries within SAP CRM – even if they use Microsoft Outlook or Lotus Notes. SAP CRM allows you to manage customer visits, account profiles, and activity-driven sales processes. It can also perform bidirectional synchronization with leading groupware solutions, letting you keep all your e-mail, contacts, calendar entries, and tasks up-to-date and consistent.

#### Opportunity Management

With the complete visibility into your sales pipeline that SAP CRM affords, you can track, qualify, and distribute leads to the appropriate sales professionals and monitor the conversion of opportunities into revenue. You can define and enforce a structured sales approach using an out-of-the-box sales methodology that comes with SAP software or adopt the sales methodology of your choice.

Features to manage pipeline performance help managers and sales reps quickly compare current sales performance with targets. Improved transparency across all stages of the sales process promotes collaboration and a mutually beneficial relationship between managers and sales reps. They can jointly identify stalled deals, monitor quota attainment, simulate and identify strategies to push deals through the sales cycle faster, and monitor the quantity and quality of sales opportunities.

#### Quotation and Order Management

To ensure superior, consistent customer service, sales professionals must have access to accurate pricing information and be able to capture orders, obtain delivery commitments, and track customer orders through to the fulfillment process. SAP CRM supports you completely in all these activities.

With the complete visibility into your sales pipeline that the SAP Customer Relationship Management application affords, you can track, qualify, and distribute leads to the appropriate sales professionals and monitor the conversion of opportunities into revenue.

#### Configuration and Pricing

SAP CRM guides sales professionals through the product configuration process – especially important for complex products with multiple options. The software presents sales professionals with all product options, pricing, and component availability of complex products, ensuring products and services fully meet customer requirements. As a result, customers can be sure of getting accurate, up-to-date pricing – including any special quotes or contracts – regardless of the sales channel. The software allows you to tailor pricing strategies per sales

channel or customer, based on criteria you select. It handles price lists and promotional, customer-specific, rule-based, and contract pricing. Because it maintains pricing rules and data centrally, it can distribute consistent information to sales professionals in the field.

#### Billing and Contract Management

With SAP CRM, you can deliver an end-to-end experience to delight your customers and promote loyalty. The software supports you in developing and managing long-term customer contracts, incorporating customer agreements into ongoing customer processes, and monitoring the sales process from inquiry to completion. Seamless integration with back-end financial and accounts receivable processes means you can do everything from generating invoices to processing payments, crediting returns, and processing claims.

#### Incentive and Commission Management

You can increase revenue and improve profitability by strategically employing incentive compensation to align the goals of individual sales professionals with those of the organization. SAP enables you to develop, implement, and manage compensation plans so you can retain your best sales professionals and motivate them to succeed. Sales professionals can track their performance and measure the potential compensation of sales in the pipeline. Sales managers have visibility into team performance.



The SAP Customer Relationship Management application equips your sales professionals with the tools they need to increase revenue, accelerate buying decisions, and maximize team productivity.

#### Sales Analytics

SAP CRM includes a rich set of analytical tools that allow you to monitor the overall health of your business. You can create accurate forecasts, proactively monitor pipeline performance, effectively manage your budgets, and properly allocate resources to meet your revenue goals.

#### Multiple Deployment Options

SAP CRM supports multiple deployment options for sales, including sales portals, mobile sales, tele-sales, and e-selling to ensure interactions with customers are consistent across all of your selling channels. The software unites the front office with the back office, so you can manage customer relationships across all communications channels with ease.

#### Maximize Productivity and Sales Effectiveness

SAP CRM equips your sales professionals with the tools they need to increase revenue, accelerate buying decisions, and maximize team productivity. With SAP CRM, you can:

- Make the most of every sales interaction by giving your sales force access to the tools and information they need – anytime, anywhere
- Increase revenue and market share by empowering sales executives with key planning and rich analytical functionality
- Improve sales processes by optimizing demand chain processes across all selling channels

- Plan and execute your supply chain more effectively with fully integrated demand chain information
- Increase customer loyalty and value by providing consistently rich, personalized customer interactions across all touch points

#### For More Information

To learn more about how SAP CRM can help drive sales performance, visit us at [www.sap.com/crm](http://www.sap.com/crm).

---

## Summary

The SAP® Customer Relationship Management (SAP CRM) application meets the sales requirements of organizations in all industries, of all sizes, and across all sales channels. It equips your sales professionals with the tools and information they need to plan, execute, and analyze sales activities throughout the sales cycle and helps you find new ways to accelerate buying decisions.

---

## Challenges

- Predicting future revenue accurately
- Leveraging sales resources effectively
- Capturing and managing all information relevant to a sales account
- Maintaining all critical business information, including that captured by third-party solutions

---

## Supported Business Processes and Software Functions

- **Sales planning and forecasting** – Increase the accuracy of demand plans and sales forecasts based on a complete picture of projected revenue and anticipated volume over time
- **Activity management** – Focus the collective energy of your sales team on the actions proven to promote profitable business
- **Opportunity management** – Profit from complete visibility into your sales pipeline to track, qualify, and allocate leads to the most appropriate sales professionals
- **Sales performance analysis** – Proactively monitor pipeline performance to assess the overall health of your business and react in real time
- **Product configuration and pricing** – Guide sales professional through the pricing process for complex products with multiple options while optimizing net margin and profitability

---

## Business Benefits

- Increased revenue and market share by empowering sales executives with strategic planning and rich analytical functionality
- Accurate forecasts
- Achievement of revenue goals through proper allocation of resources
- Improved collaboration and process consistency across all selling channels
- More effective execution of your supply chain due to fully integrated demand chain information
- Strengthened customer loyalty through consistently rich, personalized customer interactions across all touch points

---

## For More Information

Call your SAP representative or visit us at [www.sap.com/crm](http://www.sap.com/crm).

50 046 466 (07/11)

©2007 by SAP AG. All rights reserved. SAP, R/3, mySAP, mySAP.com, xApps, xApp, SAP NetWeaver, Duet, Business ByDesign, ByDesign, PartnerEdge, and other SAP products and services mentioned herein as well as their respective logos are trademarks or registered trademarks of SAP AG in Germany and in several other countries all over the world. All other product and service names mentioned are the trademarks of their respective companies. Data contained in this document serves informational purposes only. National product specifications may vary.

These materials are subject to change without notice. These materials are provided by SAP AG and its affiliated companies ("SAP Group") for informational purposes only, without representation or warranty of any kind, and SAP Group shall not be liable for errors or omissions with respect to the materials. The only warranties for SAP Group products and services are those that are set forth in the express warranty statements accompanying such products and services, if any. Nothing herein should be construed as constituting an additional warranty.