

OpenText Solution Brief
OpenText ECM Suite for SAP
ECM for Customer and Account
Management by OpenText

Objectives

Solution

Benefits

Quick Facts



Optimize Customer and Account Management with Enterprise Content Management

Higher Efficiency and Effectiveness in Customer and Account Management



Higher Efficiency and Effectiveness in Customer and Account Management

A key differentiator for successful organizations is how effectively they manage customer relations, operating at high efficiency in marketing, sales and customer service while keeping customer satisfaction high and attrition rate low.

Many processes revolve around customers, in marketing, sales, customer service and accounts receivable. Key to efficiency and success is that all customer facing roles can easily access the complete customer information.

Often however, customer information is spread across various systems and not readily available, for example to answer a customer inquiry or to resolve a dispute over an invoice.

For successful account development it is essential to have the complete customer information, his sales order history, open support calls, outstanding disputes, recent inquiries and last but not least the contract history.

ECM for SAP helps to improve customer relations while at the same time accelerating and enhancing customer related processes. It provides the account teams with a 360 degree view on customer information and a collaboration platform, deeply integrated in SAP. It enhances customer communication with compelling messaging at high quality standards.



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Full Transparency with Customer Folder

ECM for Customer and Account Management provides a 360 degree view on all information related to the customer in role specific views for all customer facing functions.

ECM for Customer and Account Management provides a customer folder with a 360 degree view on the customer. All information related to customers can be accessed in role specific business process views, structured data from SAP ERP or SAP CRM as well as all documents and correspondence that have resulted from processes in marketing, sales, customer service or revenue accounting.

As a result, all customer facing roles are fully informed about the status and current activities regarding a customer, can swiftly respond to customer inquiries and make informed decisions regarding the account.

The customer folder is fully integrated in SAP ERP and/or SAP CRM and the respective SAP user interfaces with an intuitive user interface. Alternative access is provided outside SAP in the preferred environment of the user, be it MS Outlook, Windows Explorer, or the rich Web user interface of OpenText Business Workspaces.

Full Transparency with Customer Folder

Collaboration with Business Workspace

Compelling Messaging with Customer Communication

Secure Retention and Records Management



Collaboration with Business Workspace

ECM for Customer and Account Management supports account teams with a collaboration and document management capabilities for bid creation, presales and contract management.

In addition to providing access to the complete customer information, Business Workspaces enable the collaboration between different teams working on an account, for example in the bid creation and presales process.

Regardless whether these team work inside or outside SAP, they can access the full customer information and collaboratively create all deliverables for a proposal in their preferred user interface. Even when working outside SAP, the built-in use of SAP meta data and relationship to SAP business objects reduces possible errors.

Role based personalized access, notifications, follow-ups and activity feeds increase the productivity of the account team. Guided procedures and status tracking support a structured approach in larger projects that may even involve external parties such as contractors.

Standardized folder and document structures based on templates and predefined document processes enforce a consistent project approach and facilitating the reuse of knowhow and similar projects of the past. The result is a transparent, reliable and repeatable process with high quality output.

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Compelling Messaging with
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Secure Retention and Records
Management



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Compelling Messaging with Customer Communication

ECM for Customer and Account Management enriches customer communication with individualized compelling messaging across all channels.

Customer communication is a powerful interface to the customer and can be a key differentiator. ECM for Customer and Account Management provides a platform for consistent messaging and transforms ordinary customer communications into powerful, one-to-one marketing channels.

Line-of-business users can design and deliver one-to-one messages by including targeted content on any type of enterprise document. The result is higher brand recognition and customer loyalty. At the same time it reduces IT costs by increasing communication efficiencies.

It consolidates, produces and delivers customized documents when and where you want them, ad-hoc letters or mails to the customer as well as mass documents like campaign letters or billing documents.

Full Transparency with Customer Folder

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Compelling Messaging with Customer Communication

Secure Retention and Records Management



Secure Retention and Records Management

ECM for Customer and Account Management provides secure long-term storage for customer related documents and manages them as corporate records.

Customer related document like contracts, invoices, signed delivery notes are vital documents that need to be treated as company records, be retained for a defined period of time and securely stored in a tamperproof form.

It supports a holistic enterprise program for customer records and provides defensible disposition of all corporate content. Thus it diminishes exposure to discovery and litigation costs.

The content is securely stored on an enterprise archiving platform with built-in backup, content replication and content distribution. This ensures that valuable content cannot be lost even in a disaster like a fire or flood. It grants compliance with company and legal regulations for document retention and reduces legal and operational risks.

ECM for Customer and Account Management lets you control the lifecycle of customer related content across the enterprise, inside and outside SAP. It enables the creation of file plans, retention schedules, execution of legal holds and disposition runs at the end of the lifespan of a document.

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Creating Shareholder Value with ECM for SAP

ECM for Customer and Account Management provides higher efficiency for customer related processes, reduces the cost per account managed and increases customer satisfaction.

Customer Folder provides complete access to customer information. With views adapted to the different customer facing roles, it provides easy and intuitive access. This increases content handling efficiency and user productivity and results in faster response time to inquiries and a higher decision quality. Ultimately, the cost for account management is reduced and customer satisfaction increased.

Business Workspace enables the collaboration in bid management in a consistent way. Knowhow from earlier projects can be easily reused and shared between the teams. It increases productivity and reduces cost per sale.

Customer Communication enables business stakeholders to design and deliver one-to-one messages by including targeted content on any type of enterprise document. It automates the document creation and multichannel distribution process and saves costs.

Secure Retention and Records Management grants compliance with legal regulations and reduces operational and legal risks.

As a result cost for day-to-day account management, bid management and customer communication is reduced. At the same time, the quality and speed of customer related processes are increased leading to higher customer satisfaction and retention.

Creating Shareholder Value with ECM for SAP

“ Best performers spend nearly 6 times less for account management ”

1.12 % Top Performer

2.99 % Median

7.30 % Low Performer

Cost per Account Managed as % of Revenue

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Summary

ECM for Customer and Account Management helps customers to get a 360 degree view on all relevant customer information fully integrated with SAP ERP and SAP CRM. It provides comprehensive control of customer interaction by integration of structured and unstructured content, easy collaboration and compelling customer communication.

Objectives

- Efficient management of customer relation and account development
- Easy access to complete customer information (incoming and outgoing correspondence, content from SAP ERP and CRM, contracts, ...)
- Compliance with legal regulations regarding document retention, e.g. contracts need to be treated as records

Key Capabilities

- Complete information on customer, 360 degree view
- Intuitive user interface inside and outside SAP enabling collaboration
- Compelling customer communication
- Tight integration in SAP ERP and CRM and corresponding SAP UIs
- Secure long term retention of customer records

Benefits

- Higher efficiency & productivity in customer related processes, reduced costs of sales (SG&A)
- Faster resolution time for customer inquiries, increased customer satisfaction and retention
- Higher messaging quality, brand recognition and customer loyalty
- Compliance and reduced legal and operational risks

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