

Sage Integrates 'Front-To-Back-Office' And Enhances Productivity And Business Profitability Of Companies

In today's fast growing business scenario where time is money and the customer is king, Organizations feel the need to integrate their Sales and Customer Support teams with Back office Operations and Finance departments. This will improve productivity, increase business profitability and help retain customers. The most recent trend in answering this need is the integration of business process management solutions that automate front office and back office processes, namely CRM and ERP.

The Customer Management And Business Process Challenges That Companies Face Today

Different departments use different application types to manage customer information. Front-office employees use CRM applications that support customer facing activities such as sales, marketing and customer service whereas Back-office employees use ERP applications that support transactional, reporting and compliance activities. While front-office applications have historically been developed around the idea of cross-organizational collaboration, back-office applications, by contrast, have been insular in nature, with the finance department slow to open up its data and applications to other parts of the organization. This combination of factors has meant that business applications have struggled to address key business process needs where the customer lifecycle crosses the front-to-back-office divide, resulting in,

- Departmental silos of information
- Unnecessary administrative overheads and inefficiencies
- Verbal sign off requirements
- Process duplication

The Quote-to-Cash cycle is an example of where these issues can arise. If a member of the sales team, for example, generates a quote based on out-of-date pricing information or stock availability, and subsequently converts this quote into a customer order, it is likely that this error will only be identified later at the order approval or shipping stage. The order will need to be passed back to the salesperson for correction and then re-processed by the finance department. As a result, order completion is delayed for the customer, administrative cost increased for the company and workload is unnecessarily duplicated for sales and finance staff. Clearly, where this scenario arises on a regular basis, it will impact negatively, and significantly, on overall customer satisfaction, as well as increasing transactional cost on an exponential basis.

The Fundamentals Of Front-To-Back-Office Integration

The aim of front-to-back-office integration is to bring together disconnected business processes (eg: quote-to-order and order-to-cash as part of the overall quote-to-cash cycle), applications (CRM and ERP) and datasets (financial data and non-financial), and translate them into a mechanism to:

- Manage customer relationships more effectively
- Reduce costs
- Increase profitability
- Achieve sustainable competitive advantage over the long term

Front-To-Back-Office Integration Is Made Up Of Three Inter-related Elements

Front-To-Back-Office Data Consistency

Being able to share consistent data between CRM and ERP applications is an essential requirement for front-to-back-office integration. Customer data, however, is structured according to specific application types. Organizations therefore need to be able to create dynamic links within their CRM system, to the corresponding entity within their ERP system whereby changes in either are propagated in both.

360 Degree Customer Visibility

Enabling users to view combined financial and non-financial customer information within a single application, regardless of where the information is generated or stored is another key requirement for front-to-back-office integration. 360 degree customer visibility is particularly useful for account managers, that may require access to a customer's purchase history or for customer service representatives that may need to update a customer on the status of an order. Providing these users with access to both financial and non-financial information eliminates the customer data 'blind spots'.

Straight-Through Processing

Straight-through processes enable users to initiate complex, multi-stage transactions which, using workflow management and application integration, then automatically trigger the appropriate downstream business processes, and pass seamlessly from one application to the next without the need for extensive manual intervention. The main advantage is that they reduce or remove the need to re-key information from one system to the next, reducing administrative cost and the potential for error.

Customer-centric integration of ERP and CRM is a true win-win for all concerned as it drastically cuts down order processing time, ensures quick order fulfillment, eliminates discrepancy and errors, maximizes sales potential, and enables highly targeted and effective marketing activities and complete and informed customer service. The time has come for businesses to realize this 'final piece in the customer-centricity jigsaw puzzle'. Those who discover this faster will necessarily ride the growth wave with front-to-back office integration, gain competitive advantage and build a base of satisfied customers.

The Sage 'value proposition'

Front-to-back office integration can help companies to dramatically reduce administrative cost, speed up order fulfillment and improve customer service. While this may seem like a real win-win scenario for all involved, it is not without its challenges. Undertaking point-to-point, retrospective integration can be a costly, complex, and risky proposition for SMB organizations, and even when a company manages to achieve its short term integration objectives, there is no guarantee that future CRM or ERP upgrades will not render the integration inoperable. The availability of CRM solutions with out-of-box, easy-to-deploy product integrations to market leading ERP solutions, therefore, represent a highly compelling proposition for SMB organizations seeking to leverage the benefits of front-to-back office integration cost efficiently.

Sage CRM's Out-Of-Box Integration With Sage Accpac ERP Offers Significant Advantages

- Bi-directional synchronization of customer information, both financial and non-financial, between the Sage front and back office environments
- Sage CRM enables front and back office employees to discover and share deeper, more meaningful customer insight based on a combination of CRM-derived and ERP-derived intelligence
- Sage provides an ERP-empowered CRM user experience with customer transaction information delivered through the CRM user interface
- Companies can implement 'straight-through' business processes that provide the workflow and automation capabilities that manage the entire customer lifecycle

About Sage

Sage Software India (P) Ltd is a subsidiary of The Sage Group plc, a leading international supplier of business management software solutions and related products and services for small to mid-sized businesses. Formed in 1981, the group now has 5.7 million customers. Sage Software has over 700 customers in India for its CRM and ERP products across industries like, Trading and Distribution, Manufacturing, Services, IT/ITES, Financial Services, Media, Travel and Hospitality.

For more information on Sage Integrated Suite of applications visit us at www.sagesoftware.co.in or write to us at salesindia@sage.com call +91 11 41002488 today.

