info@hand

Instant Business Information, Anywhere

Making Business Information Your Competitive Advantage

CNP Integrations

Intended Audience

This document is intended for senior managers and owners of Small and Medium Businesses/Enterprises (SMB/SMEs) with 2-200 personnel, as well as managers of divisions of larger organizations. If you are responsible for your company or some large part of it running well, keeping up a fast pace of operation, and staying profitable – then this white paper on the management of business information and the use of Customer Relationship and Business Management (CRBM) systems is for you.

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LONG REACH

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Executive Summary

This white paper examines recent developments in the management of business information, the practices being adopted by market leading firms, how your business can excel at managing its business information, and what practical advantages that will bring to your business.

With new Internet-based information technologies affordable even by smaller businesses, and the post-bubble economic climate creating extremely competitive business conditions, market leading firms are making their management of business information a focus. Now is the time to act to make sure that superior business information management is a competitive advantage, not disadvantage, for your business.

The business benefits of better information management are significant, and extend across the gamut of business interactions:

- Internal business processes are faster and easier;
- Customer interactions are better informed and create more customer satisfaction;
- Supplier interactions are more accurate and effective.

The latest technology employed to manage business information is web-based business collaboration software, which retains an organization's collective information assets on an application server accessed via web browsers on desktop PCs or handheld mobile devices. No software need be installed on the client device other than a browser. Telecommuters and mobile workforces dovetail smoothly into this approach.

These systems are marketed and sold under a profusion of different terms, but they share the common goal of addressing a broad range of business management requirements from a customer-centric data model using browser-based delivery. This includes managing information and processes related to sales and service, order management, marketing, project management and services, Human Resources, online sales, and telecommunications such as IP Telephony, Instant Messaging and Email. In this document we use the term CRBM to refer to these systems.

While larger firms are accustomed to working from an integrated set of business information, small and medium firms have been unable to afford the $3-5M implementation budgets for SAP and the like. With the advent of CRBMs, they can now afford to enjoy the business efficiencies that stem from having all departments sharing the same set of business information.

When using a CRBM, all staff members share the same account and contact information, and relate what they do, and the work products they produce, to those accounts and contacts – your clients, suppliers and partners. This is a key distinguishing characteristic of the CRBM – it is supplied bundled with a series of applications which proactively link the departments in a business together, and make the overall solution vastly more affordable.

By leveraging the common contact and account information across the many domains within the business (sales, service, HR, finance, project management, system administration), the CRBM creates bridges between the former islands of information, resulting in remarkable gains in the efficiency of communication of business information between employees and departments, and from there to clients, suppliers and partners.

info@hand is an example of a modern CRBM - available as an On Demand Service as On Premise software. Available from CNP Integrations, info@hand illustrates the power of the CRBM to integrate an organization's business information. An online demo may be found at www.learningcrm.com/iah/.

Introduction

In today's business world, powerful Internet-based information technologies are available and affordable even to smaller organizations, and are revolutionizing the internal business processes of those organizations that lead the market. Your business can no longer afford to rely on word of mouth to inefficiently and ineffectively communicate your corporate information to all those who need it. What was once 'good enough' is now a potential death sentence in an increasingly cost-conscious and fast-paced business environment. This is the business information problem you likely face today. In this white paper we examine how today's business problem can become tomorrow's competitive advantage.

Technology can offer a powerful competitive advantage to small and medium-size companies that maximize their IT investments. And it seems that they are prepared to do just that. Research from Gartner showed that in 2006, small and medium-size businesses planned to increase IT expenditures much more than larger enterprises (as a percentage of revenue), citing reduced operating costs, increased utilization of existing systems, improved IT efficiency and better customer service levels as the primary drivers for these IT investments.

The Evolution of Business Information

The evolution of Business information as a fundamental tool of business can, and must, be examined from both a business and technology perspective. From a business point of view, faster, more accurate and more comprehensive transfer of information within an organization to authorized recipients simply makes that organization a better competitor. Internal business processes take less time and effort. Customer-facing business processes are better informed and produce greater customer satisfaction. Supplier interactions are more accurate and effective. This is good news if yours is the business gaining these advantages – but not if it is your competitor.

From the technology perspective, we have passed through the eras of the centralized mainframe, the departmental mini-computers, and the powerful but expensive free-for-all revolution of the PC and client-server architectures. We are now entering an era in which business PCs hold little more than a local operating system, an office suite, audio/video software, and a browser. The time when all of this is held in flash memory and the PC is instant-on will be soon upon us. Organizations have understood for some time now that business information assets which are located on the hard drive of an individual PC are not really assets to the organization, but solely to an individual.

The trends towards server-based corporate information assets and away from client-server computing (where a program must be installed and maintained at high cost on the PC of each employee who is to use it) have collectively led us to the point where the next architectural paradigm is browser- and Internet-based corporate computing. In this new corporate computing architecture, core knowledge-worker tools like office suites are still resident on the PC, as fundamental to their operation as the operating system. But most collaborative business applications are delivered to PC browsers from central web servers, which retain the collective work product of all employees.

Web-based corporate computing also dovetails nicely with the increasing societal pressures for telecommuting options and mobile workforces, as wireless notebooks and handheld devices (such as Treo, BlackBerry, iPhone and the Windows Mobile-based Smartphone) join the PC and Mac as viable client devices for web-based applications.

Very simply – if you embrace this new corporate computing technology aggressively it will become a key enabler of multiple competitive advantages for your business. And if you do not, your organization's relevance and competitiveness in the marketplace will erode until you belatedly adopt them, or perish.

The Business Problem

Why You Need An Information Focus

Most of us have been in organizations which suffered from the 'islands of information' syndrome. Sales has their Customer Relationship Management System (CRM). Quotations and Invoices come from another system. Finance runs their ledgers separately from the Invoicing system. Manufacturing and Shipping may have yet another copy of client data in an MRP, or shipping control software. Service tracks client trouble tickets on yet another system. Years of people's lives are wasted transcribing transaction and customer data from one island of information to the next, introducing errors and time lags in the corporate information stream as they go. And yet – for the small and medium business which is not in the market for a $3-5M SAP installation, integrating these islands of information, affordably and effectively, has been next to impossible.

If information is understood by certain individuals but not exposed to others, then it is not known by the organization. Without this sharing of information, there is no learning and no growth in organizational knowledge. And operational efficiencies are destined to under-perform market-leading organizations. The creative synergies that can be found in the most innovative and creative businesses exist as a result of very real efforts to foster learning, open, and sharing organizational cultures. This does not occur by happenstance, but only as a result of a proactive corporate initiative.

With the average knowledge worker spending 25 to 30 percent of the workday looking for the information they need to complete their assigned tasks, as reported by Gartner, it's easy to see the value of a one-stop, internal source of company information. By doing so, you can capitalize on your company's knowledge assets.

Let's look at a few specific examples of business advantages which could result from improved management of business information:

❖ If your sales people (and their managers) could see all the open issues in customer service which were associated with their accounts, wouldn't they be more likely to make sure the issues were dealt with, and their customers came away happy?

❖ If your sales people could systematically see what customer service contracts were expiring in the next month, or had already expired, wouldn't they be more likely to chase these renewals more consistently?

❖ If all your company's HR policy documents and health care claim forms were available to all staff in a known place, and guaranteed to be the latest version, wouldn't that be quicker and more effective than searching for an old email?

❖ If all your ongoing services projects had their projected monthly costs and income updated regularly by the project managers and automatically rolled up company-wide, wouldn't you have a more accurate view of how this month's services P&L is going to come out?

❖ If all your outright sales opportunities were automatically rolled up into sales pipeline figures that were broken down by sales stage, region and sales person, and available immediately to sales management as well as finance, wouldn't that bring sales issues to the attention of both sales and general management more quickly - and provide more time in which to solve them?

❖ If all your customer account records, contacts, and account interaction history were secured in a unified system, wouldn't you be a bit less concerned about turnover in the sales force?

❖ If all your staff had electronic HR files with vacation and sick days tracked, emergency contact information, and their resumes, job descriptions, performance reviews, and disciplinary notices attached, wouldn't you feel less exposed to compliance issues for employers? And better documented in the case of a dismissal?

❖ If your sales and service staff automatically entered updated information after each customer visit, wouldn't customer issues be dealt with more quickly, and sales forecasts be more accurate?

❖ If your sales management could see right away that R&D was running behind schedule on a new product line, wouldn't they keep the focus on today's products a little longer, and manage customer satisfaction, and quarterly revenues, in a more productive manner?

By now, you can see some of the wide-ranging benefits of having a focal point for business information within any organization. These benefits start with even the smallest organizations, of only two or three employees or contractors, and continue right up to the Fortune 1000.

❖ In a Forrester survey of Fortune 1000 companies, 96 percent said they were building or already using an internal Web solution for information sharing, and only four percent had no plans to invest in intranet technology.

❖ Most small to medium-sized organizations in the U.S. believe that having an intranet or CRBM is important, according to Modalis Research Technologies. Almost three-quarters of those polled said having an intranet allows their staff to work more efficiently and productively, and 72 percent said an intranet improves collaboration and knowledge sharing.

❖ A 2003 survey of business leaders by KPMG found 80% of respondents considered knowledge a strategic asset, and 78% believed they would miss business opportunities by failing to profitably exploit available knowledge. For a company looking to improve its bottom line, it pays to have well-aligned business functions.

❖ In a recent AMR research report, 90% of respondents said collaboration, such as via CRBMs, was important to their future business strategies.

Technology Considerations

What Is A CRBM?

The latest technology employed to manage business information is web-based business collaboration software, which retains an organization's collective information assets on an application server accessed via web browsers on desktop PCs or handheld mobile devices. The users of these systems are given different roles, and authorized to view, modify or create sub-sets of business information according to these roles. And no software need be installed on the client device other than a browser. Telecommuters and mobile workforces dovetail smoothly into this approach.

These systems are marketed and sold under a profusion of different terms - Small Business Management (SBM) systems, Customer Relationship and Business Management (CRBM) systems, Business Portals and Customer Relationship Management (CRM) systems - but they share the common goal of addressing a broad range of business management requirements from a customer-centric data model using browser-based delivery. This includes managing information and processes related to sales and service, order management, marketing, project management and services, Human Resources, online sales, and telecommunications such as IP Telephony, Instant Messaging and Email. In this document we use the term CRBM to refer to these systems.

Within the CRBM sales people see sales pipelines, quotas, opportunities, leads, quotes, invoices, accounts, contacts, and cases (tickets) associated with their sales activities. Service staff sees details on service contracts, assets covered by service contracts, case information, as well as account and contact information. Human Resources staff sees employee HR records and associated documents. Administrators see user login information, and set their access roles. Project Managers see details on the projects they are managing, and the associated tasks, calls, meetings, documents and contacts. And all users see general corporate information, access the corporate document repository, and participate in the corporate calendar and employee directory.

Notice that everyone is sharing all the contacts and account information. And relating what they do, and the work products that they produce, to those contacts and accounts – your clients, suppliers, and partners. After all, what is a business if not the sum total of the interactions between the business's employees and its clients, suppliers and partners?

By leveraging the common contact and account information across the many domains within the business (sales, service, HR, finance, project management, system administration), the CRBM creates bridges between the former islands of information, resulting in remarkable gains in the efficiency of communication of business information between employees and departments, and from there to clients, suppliers and partners.

While it is not realistic (or perhaps even desirable) to expect that absolutely all the collaborative work within an organization will be performed by software provided as part of a CRBM solution, specialized departmental applications such as accounting and shipping can be integrated within the CRBM framework – for example the QuickBooks accounting system, and FedEx or UPS web-based shipping services. Additionally, graphical dashboards of business performance within the CRBM can integrate views of sales projections with views of recent financial performance linked from the accounting application data via web services. Similarly, web services (computer to computer data linkages via the

Internet) and linked web applications can be used to integrate virtually any data or applications from any source into your CRBM framework.

What Are The Alternatives To A CRBM?

Integrating business operations via the use of integrated business software is not a new idea. The historical computing paradigms of mainframes, mini-computers, and client-server computing have each seen their versions of integrated business software. Now that the browser-based collaborative computing paradigm is upon us, there are several options to consider.

For larger organizations, the integrated Enterprise Resource Planning (ERP) generation of tools such as SAP have created their initial web-based versions. The multi-million-dollar pricing of software and customization eliminates these as viable options for small and medium businesses, however.

The lower-end, more affordable accounting suites such as QuickBooks, Simply Accounting, and AccPac are now available in web-based versions. Some of them have some aspects of CRM capabilities, but generally the level of business integration offered by these products is fairly limited, and many departments in the organization are not well served.

Microsoft has developed their SharePoint Portal Server which focuses on web-based document sharing within an organization, an important aspect of sharing business information. Microsoft also has their Exchange Server, which integrates individual email and calendaring via Outlook into a collaborative business activity, and it can be deployed in a web-based version. Combining SharePoint and Exchange technologies provides a basic level of business collaboration software. For CRM one could add Microsoft CRM to the mix.

While the integration capabilities of this solution are fairly limited, from both business and technical perspectives, it represents an almost affordable solution, and does start an organization down the road of effective sharing of business information. Its relatively complex installation, integration and maintenance requirements can be somewhat challenging for smaller organizations, however - as can its price. This solution is more characteristic of a basic portal framework into which multiple web-based applications must be integrated, rather than being an integrated CRBM in itself.

The solutions considered above are by no means a comprehensive list of alternatives, but they are characteristic of the types of alternatives available today.

❖ Expensive and proprietary ERP systems;

❖ Web-based accounting suites trying to grow to cover more of the business; and

❖ Generic portal frameworks into which you can integrate separate web-based applications, to at least visually present an integrated view of business information, even if the applications to not always share data between themselves.

While each of these solutions has its place, depending on the size of an organization, and its current information technology solutions, a CRBM offers advantages to the Small and Medium Business (SMB) in data integration, ease of installation and support, cost effectiveness, and breadth of business departments covered by the integrated applications, that none of these alternatives can match.

Business Considerations

How Do I Introduce A CRBM Into My Business?

The successful introduction of a CRBM (or indeed any new business process or system) within an organization rests upon several critical usability and acceptance factors:

1. Communications Planning: Plan out which people are involved in the project, and in what roles. Also plan what messages you will bring to them, in what manner, and at what stages in the project. This is very important if you want people to work with you, not against you – and of particular importance in organizations with over 200 employees.

2. Consultation With, and Commitments From, the Key Business Stakeholders: Once you have identified who is involved, and how you will communicate with them, now go on to really involve the key people who are most affected by the coming changes, and most critical to its successful adoption. Ask for their input and suggestions, and act on them whenever possible, or risk the not-invented-here response. And get commitments for their participation and co-operation.

3. Training of Users, Managers and System Administrators, in Small Peer Group Sessions: No one likes to ask a stupid question, especially in front of their manager, or their staff. And many people will passively resist using a new system if they feel justified in claiming not to have had any training on it. So before anyone uses the live system, break your users into separate groups by their different roles, as well as different parts of the organization if that makes sense for your scale, and make sure you train every single one of them. Then be sure to have a support resource available during the first few weeks of use, to ensure that any objections or misunderstandings are handled quickly and effectively.

4. A Phased and Planned Introduction: Start with loading information into the system – one type at a time. Then start a trial implementation with a handful of friendly users. Gradually expand your scope of data, and users, making sure you always have enough support resources for the number of new users starting each day and each week.

When you adopt a CRBM, you actually have several options for how you choose to deploy it within your business. Your choices typically are:

❖ On Demand Service: This is the easiest way to get started. Just sign up for a service for however many users you have, and the supplier does the rest. You don't need any server hardware, any IT people to install it, or worry about updating or backing it up. Just point your browser to the vendor's site, login, and voila – your information on demand. After a while, however, you may find you tire of paying the monthly bills.

❖ On Premise Software: This is the most common and most conventional approach. Buy a server from a hardware vendor (to the specification recommended for your software), buy the software from your software vendor, and have your own IT staff install it, configure it, maintain it, and backup the data. You need a network at your office to connect the server to, and a permanent office Internet connection so mobile staff can access business information as well. And of course – you need your own IT skills in-house!

❖ Server Appliance: An integrated and pre-configured hardware/software combination, a purpose-built server appliance consolidates your support needs to a single CRBM vendor, and reduces the level of in-house expertise required. Just plug into your network and go.

Where Can I Get Help?

Introducing a CRBM into your everyday business requires expertise in both Information Technology (IT) and Information Management (IM). Evaluating the various products available and assessing how they would fit your business – either straight out of the shrink-wrap, or with some customization – is a task you may decide you want some help with.

If you do, you should look for a firm with both IM and IT capabilities, as well as a focus in web-based application development or deployment of Customer Relationship Management (CRM) systems, Content Management Systems (CMS) and Portals, as well as IP Telephony and Online Stores.

CNP Integrations is part of a worldwide partner network that supports and services the info@hand CRBM platform. Our partnership holds a strong focus on continuously improving business information and processes, and making them web-accessible. We succeed by offering a blend of products and services across the different Information Management and Information Technology disciplines which are critical to the process. A CRBM system for Small & Mid-Size Businesses, our info@hand™ product blends a first class CRM with Order Management, Project & Resource tracking, Customer Service, and HR. With our Customer Portal, eStore, IP Telephony and optional QuickBooks integration, info@hand can revolutionize your business' information management.

Affordable by businesses of any size, accessible in many languages, and designed to grow with your business, info@hand gives your organization instant access to its vital corporate information, via desktop or mobile devices. Most importantly, the system seamlessly blends all of the capabilities into an intuitive and friendly tabbed interface.

Please contact CNP Integrations for more information on how we can help energize your business, and turn business information into your competitive advantage.
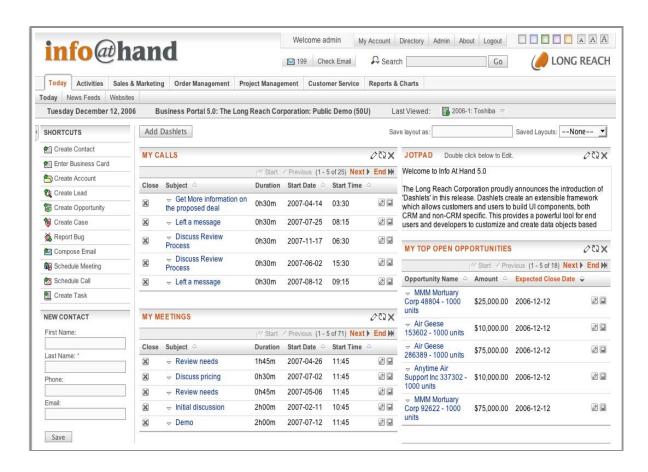
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Conclusion

Information is the lifeblood of business today. Having great people doing excellent work is not enough: the results of that work need to be instantly available throughout your organization. To work smart and get the whole team on the same page you need a strategy to create a focal point for information within your organization. Your organization needs to adopt the principal, indeed the culture, that no work task is considered complete until information about that completed task is shared with all authorized users in the organization.

The most effective way to share information automatically to all authorized users within a business of 2-200 users is the CRBM. A CRBM performs the function of an information focal point in an effective and economical fashion for most small and medium businesses.

info@hand is one example of a modern CRBM. Available from CNP Integrations, info@hand – optionally customized to manage additional functions specific to your business – can revolutionize your organization's flow of accurate and comprehensive business information, and enable a flexible anywhere/anytime desktop or mobile web-based information access model.

Making Business Information Your Competitive Advantage

To get your own FREE 30 Day Trial of info@hand
Visit : www.cnpintegrations.com

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