

Chapter 8

Achieving Operational Excellence and Customer Intimacy: Enterprise Applications

LEARNING TRACK 3: BEST PRACTICES BUSINESS PROCESSES IN CRM SOFTWARE

TABLE 8-1 Examples of Best Practice Business Processes in the Siebel CRM System

Business Process	Description
Priority-based lead qualification and distribution	Evaluates and scores leads, providing scripted assessment guides to enable sales agents to focus on the leads with the highest potential value.
Integrated customer order management	Automates the workflow for order management, including designing a customer solution, developing a detailed product configuration, applying correct pricing and contract terms, and entering and shipping the order.
Real-time offer optimization	Ensures that the optimal marketing offer is presented to a customer.
Value-based customer segmentation	Enables marketing organizations to deliver different offers and services based on current and potential customer value.
Contact strategy-based targeting	Enables marketing organizations to define and consistently enforce across the enterprise policies governing the types and frequencies of communications with customers. Ensures compliance with customer privacy and communication preferences.
Rules-based service order fulfillment	Ensures that service orders are fulfilled in an order based on the lifetime value of the customer and the specific details of that customer's service agreement.
Value-based service coverage	Ensures that an organization's highest-value customers are routed to the most-qualified customer service agents.