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Integration Creating Intelligence

By Courtney Saba

Business Intelligence (BI) integration provides added functionality to a range of enterprise software solutions. Customer relationship management (CRM) is one enterprise tool that benefits from the addition of BI insights.

Guido Haarmans, SVP of business development for technology partnerships, Netsuite, suggests that building integration between a CRM system and a BI platform is critical to the success of many businesses. "Without it, management lack visibility into the business' performance, sales will have no actionable data to acquire new customers, and marketing will have a middle view of their target market's behavior," he explains.
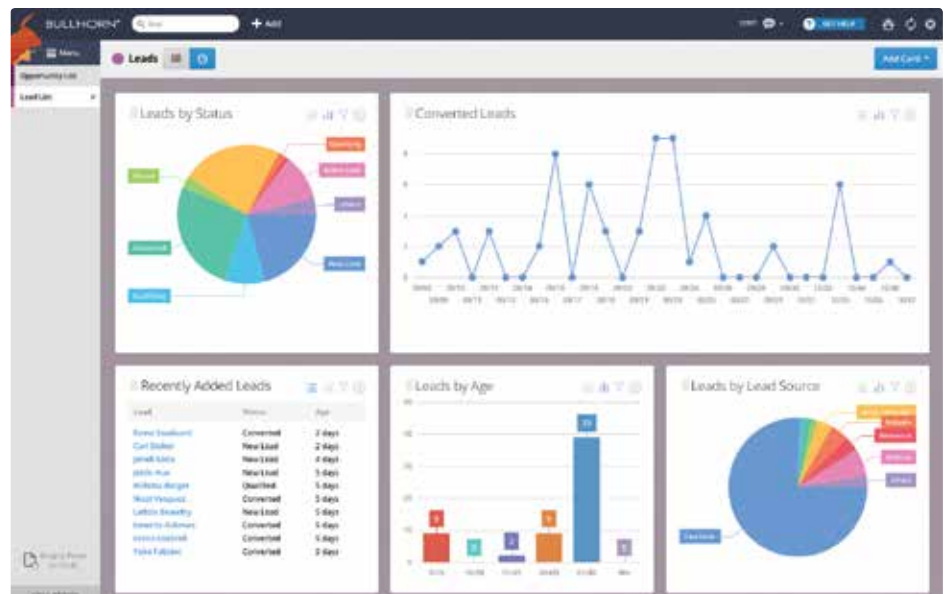
This article discusses incentives for businesses to integrate BI tools with their CRM, the challenges in doing so, as well as the latest trends shifting the market.

Bullhorn CRM includes native dashboards and BI capabilities out of the box. Beyond that, the company's solution is designed to empower users to extract further benefits from the enterprise technologies in which they have invested, including BI vendors such as InsightSquared and cube19.

Integration Incentives

To take advantage of business data, many organizations benefit from the strategic partnerships that CRM providers have forged with third-party BI vendors or have natively incorporated into their platforms. These tools provide solutions for analytics capabilities through turnkey dashboards and self-service reporting functions to generate actionable intelligence that they can use to make educated business decisions.

Kees Hertogh, senior director, CRM product marketing, Microsoft Dynamics, says that in a world where people, businesses, machines, and devices are increasingly connected and generating vast amounts of data, it is important for companies to harness it. Those that do are positioned to serve their customers better by providing personalized and proactive experiences throughout the entire customer journey. He explains that having the same actionable intelligence available across their internal sales, service, and marketing line of business (LOB) processes also enables organizations to be more productive.

"BI integrations are important as they deliver these capabilities at speed and scale, including the normalization of data across systems to ensure consistency and data quality. Additionally, BI can help improve CRM operational processes by unifying data from other enterprise systems and providing a comprehensive view of customer activity for the users," adds Jack Berkowitz, VP product management, Oracle Business Analytics Applications.

To drive growth and success, software companies need a seamlessly integrated system that not only provides a real-time view of the customer and their transaction history, but also key performance indicators that help identify issues, trends, and opportunities to allow the constant collection of data.

Haarmans believes deploying an integrated suite is usually the best route for high-growth companies looking for a platform that scales and grows with them, while also providing all the key business insights they need.

Primary Benefits

Businesses realize several benefits from leveraging BI through integration within their CRM system, including access to real-time customer

data, increased visibility, quick reporting, and seamless data sharing.

In addition to these advantages, Berkowitz adds that an effective CRM ecosystem—including BI integration—serves multiple users to deliver transactional and operational reporting for mid-level management teams on a day-to-day basis and the executive team with strategic insights. "BI integrations give users the ability to perform data discovery and exploratory analysis to uncover improvement opportunities and identify any latent risks within existing processes," he explains.

BI and advanced analytics integrated with CRM are the foundation of intelligent customer engagement. It provides LOB sales, service, and marketing managers with visibility into how organizations and individual employees are performing and helps to identify areas for improvement.

Machine learning with CRM helps companies deliver more personalized and proactive customer experiences by applying predictive capabilities to help them determine the

THIRD-PARTY POWER

Customer relationship management (CRM) solutions are powerful business tools in and of themselves. However, third-party tools offer niche benefits to propel business results for organizations looking to add more muscle to their CRM investment.

For example, TimeLinx Software offers compatible time and project management capabilities that integrate with popular CRM solutions, including integrations into Infor and Sage systems.

BW Papersystems (BWP), an operating company of the Barry-Wehmiller Companies, integrated TimeLinx into its existing Infor CRM solution streamline and automate time records, project expense processing, and gain valuable insight through business intelligence (BI) data.

BWP is a combination of four companies encompassing 12 brands that act together to synthesize manufacturing in the paper process industries. It operates under the names WillPemcoBielomatik, MarquipWardUnited, Kugler-Womako, and Curioni. Headquartered in Phillips, WI, BWP has 1,600 team members worldwide, seven global manufacturing facilities, and annual revenues of $430 million.

Before implementing TimeLinx, BPW was frustrated with its existing process of having its sales and service representatives email time and expenses in spreadsheets to managers for approval. In 2011, the company decided to do something about it.

Dave Carlsen, director of field service, North America, BWP, says the company faced several challenges with time records and project expense processes. For example, he explains that the process required photocopies of approved time and expense forms to be sent to multiple finance team members and time and expense data needed to be keyed into multiple systems. The company also experienced a slow velocity of invoicing, which resulted in a significant backlog. In general, the process lacked error proofing and easy access to real-time data and metrics.

BWP spent about a year understanding and documenting its needs and goals, investigating and piloting options, and testing in its environment. "There were not many options specifically geared for the field service market. We wanted to find a partner willing to support us with the same level of urgency that we work within. We knew any program we picked was going to require a significant amount of customization to fit our needs. Through several calls and in-person visits we identified the gaps and determined how they could be bridged. Throughout the research and pilot phases we also found many ways to improve the process even further," says Carlsen.

TimeLinx was implemented in 2011, integrated into its CRM solution, Infor CRM. Carlsen comments that prior to a full rollout, they tested the solution in parallel with its old methods for approximately six months to validate functionality and identify anything that might have been overlooked during the planning and pilot stages.

The company initially implemented TimeLinx to a limited user base. However, they eventually decided to integrate their entire project management functions—including time and expense management—into the Infor CRM system. Through this integration, BPW could manage all of its customer equipment, installation details, and project data in one consolidated solution.

Carlsen says the most important thing they did was have its leadership work closely with the IT team throughout the project to assure that they maintained velocity and that questions, concerns, and ideas were reviewed quickly. "We would not have had a successful rollout without the collaboration," he asserts.

Prior to the full rollout, BWP's implementation team worked together with Timelinx representatives on several occasions to test varying complex scenarios, validate calculations, resolve problems in real time, and create a tool that did what they needed, but was also easy for the field team to use.

In addition to streamlined and automated processes, TimeLinx also brought BI to the table. The company utilizes this data to develop automated reports that are sent to other departments based on need; daily project statistics and revenue forecasting; monthly and quarterly reports for business unit review meetings; and comparisons of monthly, quarterly, and annual actuals versus goals and previous periods.

"We continue to find ways to utilize the information stored to meet the needs of the organization. Many of the reports are run by individuals when they need the data rather than through automated emails," shares Carlsen.

In addition to the benefits a well-managed CRM solution offers, businesses like BWP leverage third-party solutions such as TimeLinx to provide a way to maximize the investment and bring new automation and insights into business operations.

next best action or other recommendations," explains Hertogh.

Haarmans adds that CRM initiatives such as personalization, customer loyalty, upselling, and cross-selling require integration between not only CRM and BI systems, but also integration to order, inventory, transactional, and supply chain data to ensure success.

Challenges

Regardless of the benefits provided by CRM and BI integration, challenges do occur.

"Today's business challenges demand timely, integrated information that enables CRM executives, managers, and front line employees to make better decisions, take action, and correct problems before they affect the company's revenue performance," points out Berkowitz.

This type of integrated data can lead to difficulties pertaining to the number of data sources that need to be connected and the sources that need to be included across the organization, such as sales, marketing, finance, and service, as well as the extent of integration and related tasks of data integration like entity resolution.

Beyond the challenges with effectively connecting data source systems, Hertogh suggests that it can be difficult to build data models and construct intuitive, easy-to-use dashboards and reports for business users. "The best solutions for companies are those that make it easy for businesses to connect their data through APIs, and offer pre-built data models, dashboards, and reports specific to LOB needs, and a business user interface that is intuitive and easy to navigate," he states.

Trendy Tools

As the importance of BI continues to evolve to businesses in all industries, brand owners expect BI trends to shift within CRM. According to Hertogh's prediction, companies increasingly seek to buy solutions that offer packaged BI content for sales, service, and marketing LOB users. Packaged content accelerates time to value for business users, and decreases the amount of time and resources IT must allocate to their business needs.

NetSuite offers cloud development tools, applications, and infrastructure that enables customers and software developers to easily integrate with third-party applications.

Berkowitz predicts improvements in the ease of consuming BI integrations, the depth of insights provided by them, and user empowerment. He also believes another trend of better self-service integrations will emerge. Newer tools collect data more effectively from different sources and allow users to construct reports and dashboards required for specific needs in an agile manner and identify what they need to see in the way it needs to be seen—without IT.

Vinda Souza, director of marketing communications, Bullhorn, predicts the line between BI and CRM will eventually transition from blurry to nonexistent.

She explains that in the business to business world, everyone is always selling—there's truly no line between pre-and post-sales. Just as these roles have merged, so too will BI and CRM.

"Any CRM system that lacks predictive reporting won't survive in this responsive selling world, one where engagement, sentiment, and behavior data reigns supreme," explains Souza. "Any system that forces unnecessary user input or commands or—even worse—requires them to request BI reports from their IT team, will be outmoded and ultimately, pushed aside for CRM that actually works for sales, rather than the converse," she says.

A Better CRM

Many CRM solutions offer BI through native features or integration with third-party

BI solutions as part of an extensive ecosystem. Below, CRM vendors highlight their BI integration offerings.

Bullhorn CRM includes native dashboards and BI capabilities out of the box. Beyond that, the company's solution is designed to empower users to extract further benefits from the enterprise technologies in which they have invested, including BI vendors such as InsightSquared and cube19.

The company manages a full marketplace, a destination for pre-integrated business applications to work seamlessly with Bullhorn CRM and amplify its capabilities. Its professional services team works with customers to leverage the Bullhorn API for integration with additional BI applications or even home-grown solutions.

Microsoft Dynamics CRM Online integrates with any BI vendor that supports oData services. PowerBI is a preferred service for BI integration, and Dynamics provides out-of-the-box templates for CRM dashboards in PowerBI today.

Hertogh says the company plans to continue investing in the solution to deliver more out-of-the-box content with PowerBI, as well as further optimize the technology integration between Microsoft CRM Online as well as PowerBI.

Oracle provides a complete CRM analytics solution supporting both pre-built and
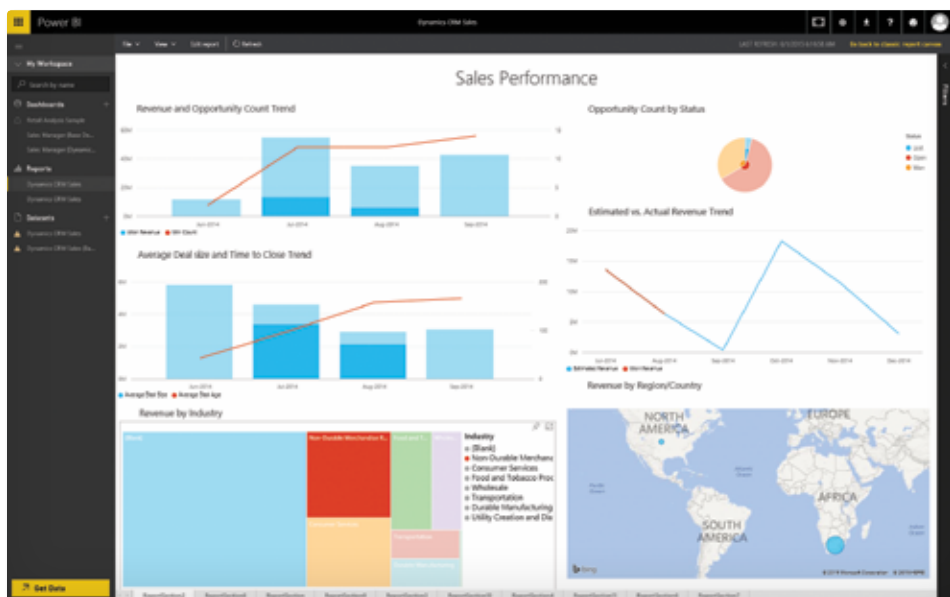
CRM systems provide users with the ability to manage, monitor, and plan, as well as provide great volume and variety of data that is analyzed, and then used to optimize actions for the best outcomes. Microsoft PowerBI is a preferred service for BI integration.

customized deployments across Oracle and third-party applications and data sources.

These sources can reside in cloud, on premises, and hybrid deployments. Berkowitz

COMPANIES MENTIONED	SW INFO See page 41 for more information.	
Company	Website	INFO#
Bullhorn, Inc.	bullhorn.com	235
Infor	infor.com	236
Microsoft Dynamics	microsoft.com	237
NetSuite Inc.	netsuite.com	238
Oracle	oracle.com	239
TimeLinx Software	timelinxsoftware.com	240

explains that Oracle often partners with integrators to deploy enterprise-class CRM analytics solutions and to build custom BI integrations with Oracle tools as needed.

NetSuite offers cloud development tools, applications, and infrastructure that enable customers and software developers to easily integrate NetSuite with third-party applications. Through the agile and flexible SuiteeCloud Platform, NetSuite has established several key partnerships with BI software providers such as Qlik, iCharts, Birst, Smart View, Adaptive Discovery, and Phocas.

Recently, NetSuite established a partnership with Tableau Software, which links NetSuite's customer and commerce data to Tableau's analytics and reporting solution. Through the partnership, joint customers can, for the first time, easily utilize Tableau's advanced data discovery and visual analytic tools to blend NetSuite with non-NetSuite data sources.

The joint solution enables customers to identify key business trends, benchmark to industries, and find latent low-cost, highmargin opportunities. It fits right in with the company's commitment to meet the rising demand among customers for out-of-the-box integration that provides insights into data with only a few clicks.

These BI-enabled CRM solutions provide limitless potential for clients willing to take the time to leverage the data.

Intelligent Capabilities

Through integration of BI tools with CRM, businesses have unlimited potential with the ability to utilize actionable intelligence by leveraging business and customer data.

A variety of applications including budgeting, contracts, document management, expense and project management, time tracking, and resource scheduling, look to BI to provide a range of benefits and capabilities.

The role of business data is increasingly important to organizations of all shapes and sizes. With the ability to leverage BI though CRM with turnkey solutions, organizations start to benefit from and utilize their data assets. SW

TimeLinx

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