CRM Analytics
SAP enhancement package 1 for SAP CRM 7.0

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Agenda

1. CRM Analytics – the right tool for the right user experience
   → SAP BusinessObjects integration in CRM
2. SAP CRM Interactive Reporting
Operational Intelligence
Unmet Needs and Challenges Across the Enterprise

Decision Excellence Needs

Strategic

Executives

Approaches and Challenges

APPROACH Business Analysts Using BI and Reporting Tools

ISSUE Huge amount of data gathering, slicing and dicing

Tactical

Middle Managers & Operational Leaders

APPROACH As Needed “data” and “reports” flowing from top, Ad-hoc analysis using Spreadsheets, Separate operational and BI Applications

ISSUE Incorrect, out-dated information, siloed, un-actionable

Operational

Junior Managers & Line Employees

APPROACH Very limited access to “reports” and intelligence, no processes enhanced by real-time intelligence

ISSUE Flying Blind !
CRM Analytics
Deliver Business Insight and Enable Effective Analysis

SAP CRM Analytics provides business users with access to unified information through a broad suite of BI tools for confident decision making and alignment across people and teams.

**Reporting**
How do I access and transform corporate data into highly formatted reports for greater insight?

**Dashboards and Visualization**
How do I visualize data for better decision making?

**Interactive Analysis**
How do I answer ad hoc questions and interact with information?

**Advanced Analysis**
How do I determine trends from complex historical data and make possible better forecasts?

**Data Exploration**
How do I find immediate answers to business questions?
<table>
<thead>
<tr>
<th><strong>CRM Analytics</strong></th>
<th><strong>The Right Tool for the Right User Experience</strong></th>
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| **Dashboards**   | - Simplified BI information with innovative & intuitive visuals  
                  - Empowers business users who are not savvy using analysis tools |
|                  | Xcelsius                                      |
| **Management reporting** | - Highly formatted management reports  
                               - Professional report layout: form-based, print-optimized reports  
                               - Low interaction rate |
|                  | Crystal Reports                              |
| **Ad-hoc reporting** | - Self-service reporting and analysis, autonomy from IT  
                               - Simple user interface, designed for the masses |
|                  | Web Intelligence / CRM Interactive Reporting  |
| **Exploration**  | - Self-service, search-driven, and discovery solution for exploring and analyzing your enterprise data |
|                  | SAP BusinessObjects Explorer                 |
| **OLAP analysis** | - Advanced analysis of multi-dimensional OLAP data |
|                  | SAP Business Explorer (BEX)                  |
Report Assignment Wizard to integrate reports and dashboards in CRM Business Roles

- Allows the Analytics Professional to directly import and assign reports and dashboards to CRM business roles
- The following report types can be imported using the wizard:
  - BW Enterprise Report 7.x
  - BW Info Provider 7.x
  - BW Query 7.x
  - BW Query Views 7.x, 3.x
  - BW Template 7.x, 3.x
  - Xcelsius dashboards
  - Crystal Reports
  - SAP BusinessObjects Enterprise reports (e.g. Web Intelligence)
Standard Xcelsius dashboards in SAP EHP1 for SAP CRM 7.0

**CRM Sales (16)**
- Sales Executive
  - Sales Executive summary
  - Sales Pipeline
  - Pipeline Sourcing
  - Sales Cycle
  - Closing
  - Customer Performance
  - Competitor Analysis
- Sales Manager
  - My Team’s Performance
  - Team Effectiveness – Lead Pursuance
  - Team Effectiveness – Quotations and Orders
  - Team Effectiveness – Sales Cycle
- Sales Representative
  - Sales Representative – Summary
  - Sales Representative – My Top Analysis
- Home Page
  - Opportunity pipeline
- Account overview
  - Sales Order Net Value (Last 8 Quarters)
- Opportunity
  - Competitive Analysis

**CRM Marketing (6)**
- Marketing Executive dashboard
- Campaign Analysis
  - Campaign Performance
  - Campaign Progress
  - Historical Campaign Analysis
- Lead Analysis
  - Lead Aging
  - Lead Analysis

**CRM Service (5)**
- Service Professional
  - Service Order Closure (Homepage)
  - Service Order Lead Time
- IT Service Professional
  - Service Request Dashboard
  - Problem Dashboard
  - Request for Change Dashboard

**Real-time Offer Management (2)**
- Marketing Professional: RTOM Offer Dashboard
- IC Manager: RTOM Dashboard
Xcelsius Dashboards – advanced integration
Homepage dashboard/report tray

SAP Sales Professional

Home

My Appointments Today

Dashboard

Sales Cycle

Average Sales Cycle

Lost Revenue by Sales Stage

Dashboard Personalization -- Webpage Dialog

Personalization

You can choose the reports you want to display in the dropdown list. By default, the first report in the Displayed Entries list is displayed in this context box.

Available Reports

Personalized List

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Enable Self-Service Access to Information and Analytics

Empower business users with powerful, yet easy to use analysis

- Intuitive, web-based interface with offline capabilities
- Start from a blank slate or use an existing analysis or report
- Multi-source access
- Interactivity with filtering, ranking, sorting, calculations, etc
- Data lineage

Lighten IT workload

- Self-service analysis and reporting
- Controlled and secure access with tight BI platform integration
- Intuitive, business-centric view of information with universes
SAP BusinessObjects Explorer in SAP CRM

BO Explorer

Welcome:  Query for Opportunities

Measures:
- No. of Doc. Headers (SUM)
- No. of Doc. Items (SUM)
- Exp. sal. vol. in ref (SUM)
- Net value in ref (SUM)

Forecast ref flag (Text)
- Relevant for...
- Not Relevant for...
- 0.77

Region (Prospect) (Text)

Country (Prospect) (Text)

You are currently exploring all data. Select values to narrow it down.

Displaying: Wt. sal. vol. in ref, Exp. sal. vol. Current Phase (Text)

Current Phase (Text)
- Decision
- Quotation
- Qualification
- Value Proposition
- Decision Making
- Other

Decision
- 60,488,155,113
- 321,327,070,394
- 10,716,224
- 80

Quotation
- 98,317,371,893
- 837,883,519,378
- 10,217,935

Qualification
- 49,522,059,876
- 504,973,680,583
- 44,450,539

Value Proposition
- 40,238,026,540
- 78,338,073,180
- 10,597,316

Decision Making
- 39,388,628,293
- 96,248,255,353
- 99,184,297

Information Exchange
- 21,499,892,757
- 324,249,801,853
- 60,262,890

Decision Making
- 921,378,920,144
- 922,372,250,372
- 396,196

Quotation
- 802,628,697,423
- 7,156,603,204
- 51,265,251

Qualification
- 200,000,000,100
- 5,000,000,000
- 1,440

Total (22)
- 264,891,281,153
- 663,518,069,861
- 350,836,864,359
1. CRM Analytics – the right tool for the right user experience
   → SAP BusinessObjects integration in CRM
2. SAP CRM Interactive Reporting
Report Areas for Sales Interactive Reporting

Ability to easily create CRM Interactive Reports for following SFA areas:

- Opportunities
- Activities
- Sales Quotations
- Sales Orders
- Sales Contracts
- Opportunity – Sales Order combined reporting

Benefits

- Monitor real-time the proportion of opportunities or quotations that have been closed by sales
- Drill down from reports to operational application
- Use intuitive report designer to easily build and integrate custom reports
Report Areas for Marketing Interactive Reporting

Ability to easily create CRM Interactive Reports for:

- Lead
- Campaign

Benefits

- Understand marketing campaign effectiveness
- Real-time analysis of lead qualification progress
- Ability to drill-down to campaign and lead for actionable insight
**SAP CRM IT Service Management**

**CRM Interactive Reporting**

**Report Areas for IT Service Interactive Reporting**

Ability to easily create CRM Interactive Reports for:

- Service Request
- Problems
- Request for Change

**Benefits**

- Gain insight of IT service processes
- Measure IT service performance and service level compliance
- Provide real-time basis for intelligent business decisions
Report Areas for Service Interactive Reporting

Ability to easily create CRM Interactive Reports for:

- Service Order / Ticket
- Complaint
- Interaction Record

Benefits

- Easy access and simple to use
- Gain instant insight into your service business performance
- Monitor real-time Interaction Center operations
- Fine tune your operations based real-time insight
End users use an intuitive user interface to analyze their data

- Leading edge user interface leveraging Adobe Flex
- Drill down/through
- Export to MS Excel
- Reports show real-time data
- Editing individual views on reports

Power users can easily create, copy, edit, delete and deploy reports

- Easy to use creation / editing wizard with report preview
- Deployment of reports to individual employees or organizations
- Support of tables and graphical charts (Column Chart, Line Chart, Pie Chart, Bar Chart, Stacked Column Chart)

Predefined standard Report Areas

- Sales
  - Opportunities
  - Activity Management
  - Sales Orders
  - Sales Quotations
  - Sales Contracts

- Marketing
  - Campaigns
  - Leads
  - Interaction Center
  - Interaction Records

- Service
  - Service Tickets
  - Service Orders
  - Complaints

- IT Service Management
  - Service Requests
  - Problem
  - Request for Change
Thank you for your attention!

Q & A