



BENTLEY SYSTEMS

NEW USER INTERFACE AND NATIVE INTEGRATION OF SAP® CRM BOOST SERVICE QUALITY AND EFFICIENCY

QUICK FACTS

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Kiran Koons, SAP CRM Manager,
Bentley Systems Incorporated

Company

- Name: Bentley Systems Incorporated
- Headquarters: Exton, Pennsylvania
- Industry: High tech
- Products and services: Software solutions for the infrastructure lifecycle
- Revenue: US\$500 million
- Employees: Over 2,700
- Web site: www.bentley.com

Challenges and Opportunities

- Eliminate fragmented processes due to an outdated customer relationship management (CRM) solution
- Avoid high costs to link existing CRM software with other applications
- Support the end-to-end processes required to improve customer service
- Gain a single view of the customer

Objectives

- Deploy a CRM solution as part of an integrated enterprise platform
- Leverage native integration to support comprehensive processes and data sharing
- Enable rollout to a broad set of business users new to CRM software

SAP Solutions and Services

SAP® Customer Relationship Management (SAP CRM) application

Implementation Highlights

- Replaced legacy CRM software implemented in 2006 with SAP CRM
- Upgraded to the latest version of SAP CRM in 2010
- Used a pilot to gather input for customizing the new user interface

Why SAP

- Best practice-based automated workflows
- Support for a comprehensive enterprise platform that can drive core operations
- Native integration between SAP applications

Benefits

- 360-degree view of customers, with data accessible to front- and back-office personnel for easier collaboration and improved service quality
- Increased employee efficiency and effectiveness through use of automated, cross-departmental workflows
- More efficient routing of customer issues to the correct department, enabling higher first-time response rates
- Improved customer satisfaction
- Better targeting of customers and prospects for campaigns and offers

Existing Environment

- Third-party CRM software
- SAP ERP application



When Bentley Systems Incorporated, a leading software provider for optimizing the infrastructure lifecycle, needed to upgrade its legacy customer relationship management (CRM) software, the firm considered all options. “We couldn’t support integrated processes across departments,” says Kiran Koons, SAP CRM manager at Bentley Systems. “We needed a solution that simplified integration with our existing systems, data sharing, and collaboration.” To meet these goals, the firm deployed the SAP® Customer Relationship Management (SAP CRM) application.

Getting By with Disconnected CRM Processes and Data

For years, Bentley Systems had relied on a third-party CRM application that offered broad functionality but largely operated as a stand-alone solution. Linking it with other enterprise software required costly, hard-coded integration, which the company had invested in as budgets permitted. But even after four years, the CRM software just wasn’t able to support the end-to-end processes needed to increase overall efficiency, improve customer service, and reduce costs.

Most important, the processes supported were too fragmented and difficult to use. Notes Koons, “Leads and opportunities, for instance, were generated in the CRM system, but our follow-up process was managed using the SAP ERP application. So what should have been a closed-loop process was split, and sales and marketing couldn’t see how each side was managing leads.” Similarly,

sales forecasting was handled outside of both systems, so IT had another whole system to keep in sync.

Equally important, nearly every department in the company needed to access CRM data to drive processes and collaborate, but limited integration made this difficult. For example, when customers called in with an issue related to contracts or invoices, the call-center agent handling the call couldn’t just create a service ticket and pass it to the back office. “We had to duplicate the service ticket information and enter it into another object type, which was difficult because our data fields were different,” explains Laurie Beauchamp, director for technical support (Americas) at Bentley Systems. “And once we handed off the customer issue, we lost visibility into how and when it was handled.”

Bentley Systems also wanted more business value from its CRM software. “After using SAP software for other areas

of our business, we saw the benefits of having predefined, flexible workflows to drive our core processes,” explains Koons. “The existing CRM software had disconnected process steps, and the interface didn’t contextualize steps for users – a real problem given that we wanted to roll out our next CRM application to a much broader set of users.”

Searching for the Right CRM Solution

The IT department had been gradually investing in SAP Business Suite applications, with the goal of having as much of the company running on a single, integrated platform as possible. When the existing CRM vendor announced it would stop supporting the product and IT found that upgrading would be as costly as replacing it, the department recognized an opportunity to pursue its platform strategy and improve the business.

Since the company had already invested in SAP ERP, SAP CRM was a logical choice to investigate. “We looked at other vendors, but SAP came out on top,” states Koons. “The SAP application offered sophisticated CRM functionality that would allow us to eliminate legacy systems and establish cross-departmental processes. Plus, we already had in-house IT resources familiar with SAP software. But we also saw SAP CRM as a way to put the whole company on one platform, which would vastly simplify integration, data sharing, and application management.”



“Because we’re all working from the same system, the hand-offs are clear, we can track service requests, and we can collaborate to serve customers better, faster, and less expensively.”

Laurie Beauchamp, Director for Technical Support (Americas), Bentley Systems Incorporated

Making the Move to SAP CRM and a New User Interface

Using a big-bang approach, Bentley Systems replaced its legacy CRM software with SAP CRM. “We didn’t just migrate to a new system,” recalls Koons. “We also introduced new processes and rolled out the software to lots of new users.” Leveraging comprehensive functionality from SAP CRM and native integration with SAP ERP, the company gained new, integrated processes that increase efficiency and effectiveness across the business.

Bentley Systems recently upgraded to the current version of SAP CRM, which offers a brand new user interface (UI)

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Kiran Koons, SAP CRM Manager, Bentley Systems Incorporated

that’s highly intuitive and easily personalized. “We saw so much potential with the new interface, so we decided to do a pilot and engage our power users in how to best configure it,” explains Koons. The pilot brought business users and IT together, enabling IT to identify what users really wanted, streamline workflows, and optimize the usability of the UI. “Because of the terrific dialogue we had with key users early in the process, we launched the software upgrade without having a single critical issue,” she adds. To ease

adoption of the upgraded software, IT created online videos that summarized what’s new, conducted virtual question-and-answer sessions, and created comprehensive user documentation.

Adding Value with a New User Interface

The company’s investments in the pilot, UI customization, and training have paid off. “With our new user interface, we’ve significantly increased user productivity,” notes Koons. While some users previously had to utilize three different interfaces to access the portal, interaction center, and SAP CRM, now they only need one unified interface. “This means everyone has the same view of customer

data, which greatly simplifies how our employees collaborate to help customers,” explains Beauchamp.

The new UI also offers more sophisticated functionality and greater flexibility. For example, users now have more options to search transactions and master data. An account overview screen gives call-center agents and other customer-facing employees a quick overview of each customer, complete with drill-downs for details. And business users can now

modify much of the screen layouts by themselves.

Collaborating Efficiently to Create Happier Customers

With the latest version of SAP CRM, Bentley Systems now has support for integrated, efficient processes that leverage best practice-based workflows developed by SAP. “We’ve realized significant improvements in productivity and efficiency, even among users who are totally new to SAP CRM,” states Beauchamp. “But I think our external customers have benefited the most from these changes. They are the ones who see improved issue response times and more efficient routing of their issues to the correct departments, which have improved our first-time response rates. Clearly, we can now provide a more consistent user and service experience.”

For example, now that both back- and front-office employees are working from the same trusted source of customer data and linked processes, collaboration is faster and more efficient. “When a customer calls in about an invoice or contract issue, our service agents create a service ticket and just send it directly to the back office for handling, with no extra manual work,” explains Beauchamp. “Because we’re all working from the same system, the hand-offs are clear, we can track service requests, and we can collaborate to serve customers better, faster, and less expensively.”

Automated workflows built into SAP CRM also facilitate hand-offs between departments and enable greater visibility and control. For example, Bentley Systems now has closed-loop lead management. "Marketing can capture leads from the Web, a call, or an event and route them to the right sales representative through SAP CRM," states Koons. "Sales can then follow through with the process of contacting people and creating quotes in a timely manner." Once orders are closed, other departments have what they need to process customer orders faster and invoice more quickly.

Even inputting information into the problem-solution knowledge base used by the technical support team is faster and easier. Explains Beauchamp, "Before the upgrade, employees had to go to a portal and enter data using multiple screens. Now they can do it through one unified screen directly within SAP CRM. And because the latest version of SAP CRM supports multiple sessions per user, they can start work on a knowledge base entry and then jump to another session to handle a customer call – all without losing their knowledge base entry. Our knowledge base has now increased, and

our customers have benefitted from faster, more effective issue handling."

As these examples illustrate, the latest version of SAP CRM has provided Bentley Systems with a unified UI and enhanced workflows that reduce manual work, improve customer experiences, and enable management to get more from their employees. States Koons, "The new UI is so intuitive and easier to use than the previous one. Everyone across marketing, sales, billing, renewals, technical support, and order and contract management can execute their tasks faster, which accelerates processes, reduces costs, and improves customer service."

Looking Ahead

Going forward, Bentley Systems plans to leverage additional functionality within SAP CRM. "We'll have more categories and subcategories to classify requests," explains Beauchamp. "And we'll be able to track multiple issues per service request and manage them together." Adds Koons, "Each of these added functions is just one more way that SAP CRM can help us increase visibility and control, deliver better service, and increase efficiency."

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