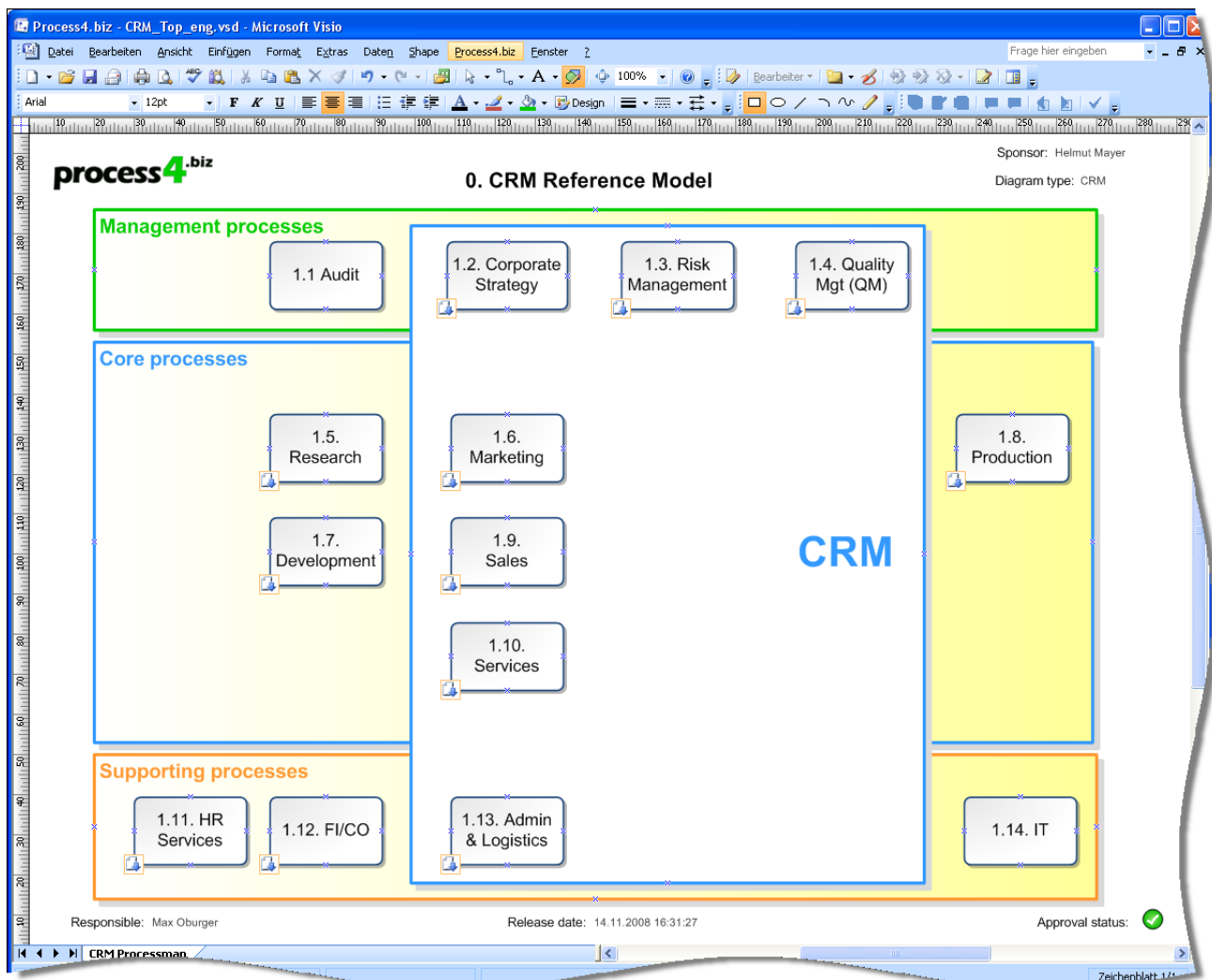


## REFERENCE MODEL: Customer Relationships Management (CRM)

The process4.biz CRM reference model presents best practice processes based on established standards for CRM-focussed company departments like Sales, Service and Marketing. Interdependencies between CRM processes on the one hand and core, supporting and management processes on the other are also accounted for.

The reference model is ready to use as delivered, but it also lends itself readily to individual modifications. Divergencies from our best practice model can be mapped by any other CRM software to analyse and document company specific processes. Our solution is based on the functions and features of the process4.biz Core module. The reference model may be complemented by an **interface to Microsoft Dynamics CRM**, or connected to any other (preferably web-based) CRM-Software.

The following figure displays the scope of mutual influence between CRM and other company processes:



The standard functions of the process4.biz Core module provide tools for visualization, analysis, development and documentation of the company organizational structure, including various technical, legal, and geographical details.

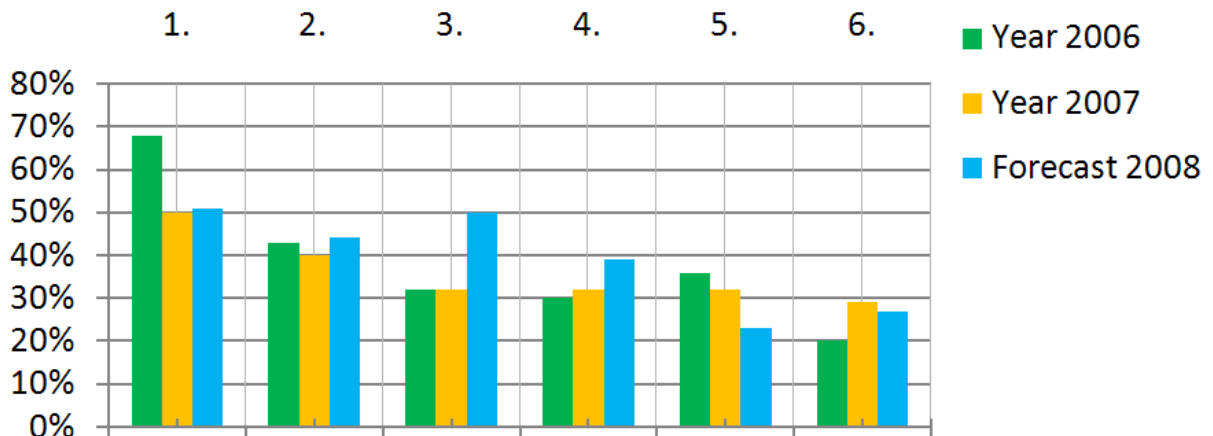
## BENEFITS OF THE REFERENCE MODEL process4.biz CRM

### Define tasks between CRM and other systems

As case studies frequently point out, CRM has developed to be a key issue concerning more than one company department. CRM implementations should account for the fact that it has become to be **part of corporate strategy** and a common concern for several departments, among others Sales and Management. **Task allocation and responsibility assignment** between distinct, but interrelated systems belong to the most complex and difficult CRM tasks. The process4.biz reference model reflects this complexity and presents a solution that can be deployed “as is” or modified to account for company specific details. The model defines all information necessary for **process maturity evaluation (SPICE/ISO15504)**.

An appropriate CRM system should account for the following topics (case study from 2008):

1. customer oriented Business Process Optimization
2. Customer Segmentation and Customer Value Modeling
3. Implementation and optimization of an integrated CRM system
4. Marketing Automation and Campaign Management
5. Complaint Management
6. Multichannel Integration



[http://www.de.capgemini.com/presse/pressemitteilungen/crm\\_barometer\\_2008](http://www.de.capgemini.com/presse/pressemitteilungen/crm_barometer_2008)

### Best practice modeling templates for CRM

The process4.biz reference model contains about 100 generic diagrams and 600 objects. Descriptions for the processes and RACI-based specifications for the tasks and responsibilities involved are included. The descriptions are valid regardless of the specific CRM software you use. Sales activities and overall customer orientation will benefit from the reference model even without any adaptation at all.

### Integrated documentation for Dynamics CRM

Company specific deviations from the Dynamics CRM standard processes can be documented by means of the process4.biz software. Different types of documents may be used for external documentation purposes. Process4.biz provides easy-to-use **extension modules** for communication or publishing tasks relating to CRM. For detailed information about process4.biz extension modules please refer to our website (<http://www.process4.biz>).