Srini Katta

Discover SAP® CRM
# Contents at a Glance

1. Customer Relationship Management ........................................ 25
2. SAP CRM Detailed Overview .................................................. 41
3. SAP CRM Marketing .............................................................. 59
4. SAP CRM Sales ................................................................. 77
5. SAP CRM Service ............................................................... 97
6. SAP CRM Interaction Center .................................................. 121
7. SAP Web Channel Experience Management Solution .......... 151
8. SAP CRM Mobile Applications ............................................. 173
9. SAP CRM Partner Channel Management ............................... 195
10. The Technology and Tools Behind SAP CRM ....................... 225
11. Master Data ........................................................................ 247
12. Working with SAP Industry Vertical Solutions ...................... 273
13. SAP CRM Analytics ............................................................ 297
14. SAP CRM User Access ........................................................ 333
15. Building an SAP CRM System .............................................. 343
16. Case Study: Canadian Blood Services ................................. 357
17. Case Study: Yaskawa America, Inc. ..................................... 365
18. Case Study: Intuitive Surgical .............................................. 373
## Contents

### 7 SAP Web Channel Experience Management Solution

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>E-Marketing</td>
<td>153</td>
</tr>
<tr>
<td>Demand Generation</td>
<td>154</td>
</tr>
<tr>
<td>Catalog Management</td>
<td>155</td>
</tr>
<tr>
<td>Personalization</td>
<td>155</td>
</tr>
<tr>
<td>E-Commerce</td>
<td>156</td>
</tr>
<tr>
<td>Interactive Selling</td>
<td>157</td>
</tr>
<tr>
<td>Pricing</td>
<td>159</td>
</tr>
<tr>
<td>Order to Cash</td>
<td>160</td>
</tr>
<tr>
<td>Web Auctions</td>
<td>166</td>
</tr>
<tr>
<td>E-Service</td>
<td>167</td>
</tr>
<tr>
<td>Knowledge Management</td>
<td>168</td>
</tr>
<tr>
<td>Service Management</td>
<td>169</td>
</tr>
<tr>
<td>Web Channel Analytics</td>
<td>170</td>
</tr>
<tr>
<td>Conclusion</td>
<td>170</td>
</tr>
</tbody>
</table>

### 8 SAP CRM Mobile Applications

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction to SAP CRM Mobile Technology</td>
<td>175</td>
</tr>
<tr>
<td>SAP CRM Mobile Sales</td>
<td>177</td>
</tr>
<tr>
<td>Mobile Sales Laptop</td>
<td>177</td>
</tr>
<tr>
<td>Mobile Sales Handheld</td>
<td>180</td>
</tr>
<tr>
<td>Mobile Sales Online: Multiple Support</td>
<td>184</td>
</tr>
<tr>
<td>SAP CRM Field Service</td>
<td>185</td>
</tr>
<tr>
<td>Mobile Service Laptops</td>
<td>186</td>
</tr>
<tr>
<td>Sybase Mobile Sales for SAP CRM</td>
<td>188</td>
</tr>
<tr>
<td>Sybase Unwired Platform</td>
<td>188</td>
</tr>
<tr>
<td>SAP CRM Service Manager</td>
<td>190</td>
</tr>
<tr>
<td>Micro Mobile Apps</td>
<td>191</td>
</tr>
<tr>
<td>Case Study</td>
<td>192</td>
</tr>
<tr>
<td>Conclusion</td>
<td>193</td>
</tr>
</tbody>
</table>

### 9 SAP CRM Partner Channel Management

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Why Use Channel Partners?</td>
<td>196</td>
</tr>
<tr>
<td>Channel Management and SAP</td>
<td>197</td>
</tr>
<tr>
<td>Section</td>
<td>Page</td>
</tr>
<tr>
<td>-----------------------------------------------------</td>
<td>------</td>
</tr>
<tr>
<td>11 Partner Management</td>
<td>199</td>
</tr>
<tr>
<td>Partner Recruitment</td>
<td>199</td>
</tr>
<tr>
<td>Partner Profiling and Segmentation</td>
<td>201</td>
</tr>
<tr>
<td>Partner Training and Certification</td>
<td>201</td>
</tr>
<tr>
<td>Partner Networking</td>
<td>203</td>
</tr>
<tr>
<td>Partner Compensation</td>
<td>204</td>
</tr>
<tr>
<td>Partner Planning and Forecasting</td>
<td>204</td>
</tr>
<tr>
<td>Channel Marketing</td>
<td>204</td>
</tr>
<tr>
<td>Partner Communication</td>
<td>205</td>
</tr>
<tr>
<td>Catalog Management</td>
<td>205</td>
</tr>
<tr>
<td>Campaign Management</td>
<td>205</td>
</tr>
<tr>
<td>Lead Management</td>
<td>206</td>
</tr>
<tr>
<td>Channel Marketing Funds</td>
<td>206</td>
</tr>
<tr>
<td>Partner Locator</td>
<td>207</td>
</tr>
<tr>
<td>Channel Sales</td>
<td>208</td>
</tr>
<tr>
<td>Account and Contact Management</td>
<td>208</td>
</tr>
<tr>
<td>Activity Management</td>
<td>209</td>
</tr>
<tr>
<td>Opportunity Management</td>
<td>210</td>
</tr>
<tr>
<td>Channel Sales Analytics</td>
<td>210</td>
</tr>
<tr>
<td>Partner Order Management</td>
<td>210</td>
</tr>
<tr>
<td>Quotation and Order Management</td>
<td>211</td>
</tr>
<tr>
<td>Interactive Selling and Configuration</td>
<td>212</td>
</tr>
<tr>
<td>POS and Channel Inventory</td>
<td>212</td>
</tr>
<tr>
<td>Collaborative Showrooms</td>
<td>212</td>
</tr>
<tr>
<td>Distributed Order Management</td>
<td>213</td>
</tr>
<tr>
<td>Channel Service</td>
<td>215</td>
</tr>
<tr>
<td>Knowledge Base</td>
<td>216</td>
</tr>
<tr>
<td>Live Support</td>
<td>217</td>
</tr>
<tr>
<td>Service Order Management</td>
<td>217</td>
</tr>
<tr>
<td>Complaints and Returns Management</td>
<td>218</td>
</tr>
<tr>
<td>Partner and Channel Analytics</td>
<td>218</td>
</tr>
<tr>
<td>Case Study</td>
<td>219</td>
</tr>
<tr>
<td>Conclusion</td>
<td>222</td>
</tr>
</tbody>
</table>

10 The Technology and Tools Behind SAP CRM .......... 225

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAP NetWeaver Introduction</td>
<td>225</td>
</tr>
<tr>
<td>Service-Oriented Architecture (SOA)</td>
<td>226</td>
</tr>
<tr>
<td>SAP NetWeaver Integration</td>
<td>228</td>
</tr>
</tbody>
</table>
Pricing Master Data .............................................................. 266
SAP Internet Pricing and Configurator (IPC) .................... 267
Condition Technique and Condition Records .............. 269
Case Study ............................................................................ 270
Conclusion ............................................................................ 271

12 Working with SAP Industry Vertical Solutions ....... 273
Automotive ........................................................................ 274
Chemical Industry ................................................................. 275
Consumer Products (CP) ....................................................... 276
  Brand Management ........................................................ 277
  Category Management ................................................... 278
High-Tech ............................................................................. 278
Oil and Gas ........................................................................... 279
Pharmaceutical ................................................................. 280
Financial Services (Banking and Insurance) ................. 282
Leasing ................................................................................. 283
Media ................................................................................... 285
Professional Services ....................................................... 286
  Strategy and Planning .................................................... 287
  Business Development .................................................. 288
  Service Delivery ............................................................ 288
  Engagement Management ............................................. 288
  Performance Management .............................................. 288
Public Sector ........................................................................ 289
  Constituent Services ....................................................... 289
  Case Management .......................................................... 290
  Grantor Program Management ..................................... 290
Retail .................................................................................... 290
Telecommunications ............................................................. 291
Utilities .................................................................................. 293
  Interaction Center ........................................................... 293
  Campaign Management .................................................. 293
  Contract Management .................................................... 293
  Meter Reading and Billing .............................................. 294
  Invoice and Revenue Management ................................ 294
Case Study ............................................................................ 295
Conclusion ............................................................................ 295
Contents

13 SAP CRM Analytics ...................................................... 297

Approaches and Scenarios ................................................ 298
Marketing Analytics .......................................................... 303
  Market Budget Planning .................................................. 304
  Campaign Planning .......................................................... 304
  Target Group Optimization ............................................. 305
  Market Plan Analysis ..................................................... 305
  Campaign Monitoring and Success .................................. 306
  Lead Analysis ................................................................. 306
  External List Cost and Revenue Analysis .......................... 309
Sales Analytics ................................................................. 311
  Territory Management Analysis ...................................... 312
  Activity Management Analysis ........................................ 312
  Opportunity Management Analysis .................................. 312
  Sales Quotation and Order Management Analysis ............ 312
  Contract Management Analysis ....................................... 314
  Sales Pipeline Analysis ................................................... 314
  Sales Funnel Analysis ..................................................... 315
  Sales Performance Analysis ............................................. 316
  Billing Analysis ............................................................... 317
Service Analytics .............................................................. 318
  Service Quality Analysis ................................................ 319
Customer Analytics .......................................................... 324
  Customer Migration Analysis ........................................... 324
  Churn Management .......................................................... 325
  Customer Lifetime Value (CLTV) ...................................... 326
  Customer Satisfaction and Loyalty Analysis ...................... 327
Product Analytics ............................................................. 327
  Cross-Selling Proposals .................................................. 328
  Product Profitability Analysis ......................................... 328
Interaction Channel Analytics ............................................. 328
  Web Channel Analytics ................................................... 329
  Interaction Center Analytics ............................................ 330
SAP CRM on HANA .......................................................... 330
Conclusion ................................................................. 331
### 14 SAP CRM User Access

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Access Modes</td>
<td>334</td>
</tr>
<tr>
<td>Desktop/Laptop</td>
<td>334</td>
</tr>
<tr>
<td>Notebook Computers</td>
<td>334</td>
</tr>
<tr>
<td>PDA Companion</td>
<td>335</td>
</tr>
<tr>
<td>Tablets</td>
<td>335</td>
</tr>
<tr>
<td>Handheld Devices</td>
<td>337</td>
</tr>
<tr>
<td>Smartphone</td>
<td>337</td>
</tr>
<tr>
<td>SAP CRM-Enhanced Usability</td>
<td>338</td>
</tr>
<tr>
<td>Design Layer Customizing</td>
<td>341</td>
</tr>
<tr>
<td>Conclusion</td>
<td>341</td>
</tr>
</tbody>
</table>

### 15 Building an SAP CRM System

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discover Your Business Needs</td>
<td>343</td>
</tr>
<tr>
<td>Set Up a Team and/or Hire an SAP CRM Business Application Consultant</td>
<td>344</td>
</tr>
<tr>
<td>Conduct Discovery Sessions</td>
<td>344</td>
</tr>
<tr>
<td>Business Scenario Analysis</td>
<td>345</td>
</tr>
<tr>
<td>Design and Development</td>
<td>346</td>
</tr>
<tr>
<td>Functional Design</td>
<td>346</td>
</tr>
<tr>
<td>Technical Design</td>
<td>347</td>
</tr>
<tr>
<td>Implementation/Configuration/Development</td>
<td>347</td>
</tr>
<tr>
<td>End-to-End Deployment</td>
<td>347</td>
</tr>
<tr>
<td>Project Methodologies</td>
<td>348</td>
</tr>
<tr>
<td>ASAP Methodology</td>
<td>348</td>
</tr>
<tr>
<td>Cycle Methodology</td>
<td>354</td>
</tr>
<tr>
<td>Conference Room Pilot (CRP) Methodology</td>
<td>355</td>
</tr>
<tr>
<td>Conclusion</td>
<td>355</td>
</tr>
</tbody>
</table>

### 16 Case Study: Canadian Blood Services

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Objectives and Goals</td>
<td>358</td>
</tr>
<tr>
<td>Align to Strategies to Recruit, Schedule, and Retain Donors</td>
<td>358</td>
</tr>
<tr>
<td>Support Current Collections, Target, and Future Business Model</td>
<td>358</td>
</tr>
<tr>
<td>Deliver Efficiency and Productivity Gains</td>
<td>358</td>
</tr>
<tr>
<td>Section</td>
<td>Page</td>
</tr>
<tr>
<td>------------------------------------------------------------------------</td>
<td>------</td>
</tr>
<tr>
<td>Technology Challenge</td>
<td>359</td>
</tr>
<tr>
<td>Solution Deployment</td>
<td>360</td>
</tr>
<tr>
<td>Value Achieved</td>
<td>361</td>
</tr>
<tr>
<td>Lessons Learned</td>
<td>362</td>
</tr>
<tr>
<td>Looking Ahead</td>
<td>363</td>
</tr>
<tr>
<td>17 Case Study: Yaskawa America, Inc.</td>
<td>365</td>
</tr>
<tr>
<td>Business Drivers</td>
<td>365</td>
</tr>
<tr>
<td>Operational Drivers</td>
<td>365</td>
</tr>
<tr>
<td>Administrative Drivers</td>
<td>366</td>
</tr>
<tr>
<td>Technology Challenges</td>
<td>366</td>
</tr>
<tr>
<td>Solution Deployment</td>
<td>367</td>
</tr>
<tr>
<td>Value Achieved</td>
<td>369</td>
</tr>
<tr>
<td>Lessons Learned</td>
<td>371</td>
</tr>
<tr>
<td>Looking Ahead</td>
<td>371</td>
</tr>
<tr>
<td>18 Case Study: Intuitive Surgical</td>
<td>373</td>
</tr>
<tr>
<td>Business Challenges</td>
<td>373</td>
</tr>
<tr>
<td>Business Objectives</td>
<td>374</td>
</tr>
<tr>
<td>Solution Deployment</td>
<td>375</td>
</tr>
<tr>
<td>Value Achieved</td>
<td>376</td>
</tr>
<tr>
<td>Lessons Learned</td>
<td>380</td>
</tr>
<tr>
<td>Looking Ahead</td>
<td>381</td>
</tr>
<tr>
<td>A Glossary</td>
<td>383</td>
</tr>
<tr>
<td>B The Author</td>
<td>395</td>
</tr>
<tr>
<td>Index</td>
<td>397</td>
</tr>
</tbody>
</table>
Preface

This is certainly not the first book on SAP CRM. Many books are available that address particular SAP CRM technologies and solutions, but *Discover SAP CRM* is the only book that explains the fundamentals of customer relationship management, the foundations of SAP CRM, and the business solutions that SAP CRM makes possible.

This book explains customer relationship management in general and SAP CRM in an easy-to-understand way, including valuable examples and business case studies on how to leverage SAP CRM business solutions to optimize your company’s customer relationships and revenue channels.

Who is this Book For?

In general, *Discover SAP CRM* is geared toward those involved in the customer relationship management process on many levels; however, the following groups of people will find this book especially helpful:

› C-level executives who need a quick reference guide on SAP CRM solutions to help them make decisions about the future course of their company’s SAP CRM platform

› Managers who want to know about SAP CRM in detail before kicking off an SAP CRM project, but maybe scared off by the thought of sifting through volumes of documentation and tons of PowerPoint presentations to learn about SAP CRM

› Business analysts who know their companies’ business processes very well and are scratching their heads, wondering how to map those processes with the SAP CRM system because they are new to SAP CRM solutions and technologies

› Senior consultants who worked with non-SAP CRM solutions and technologies in the past and are planning to make a career move to the SAP CRM platform
What You’ll Discover

In this book, you’ll learn about the entire suite of SAP CRM business applications that you’ll use when creating CRM strategies and solutions that work for your customers and your company. You’ll also find an overview of each of the major products with sample case studies so you can see how each product works in the real world.

Navigational Tools in this Book

Throughout the book, we’ve provided several elements that will help you access useful information:

- Tips call out useful information about related ideas and provide practical suggestions for how to use a particular function.
- Notes provide other resources to explore, or special tools or services from SAP that will help you with the topic under discussion.
- Examples provide real-world scenarios and illustrations of how the tools are used.
- Marginal text provides a useful way to scan the book to locate topics of interest for you. Each marginal note appears to the side of a paragraph or section with related information.

What’s in This Book?

This book provides you with a detailed overview of SAP CRM. You’ll learn about everything from the three core applications of Marketing, Sales, and Service, to the interaction center, channel management, master data, analytics, access modes, and more.
› **Chapter 1**  
This chapter provides the definition and fundamentals of customer relationship management and discusses CRM business needs and CRM core principles.

› **Chapter 2**  
This chapter introduces SAP CRM, its components, and the 360-degree view of customer relationship management.

› **Chapter 3**  
This chapter focuses on the definitions and basics of the SAP CRM Marketing application and discusses the business uses of the various components.

› **Chapter 4**  
This chapter provides elaborate details concerning the SAP CRM Sales application, including account and contact management, order management, sales planning, incentive and commission management (ICM), and various sales analytics.

› **Chapter 5**  
This chapter discusses SAP CRM Service, which is the strongest application in the CRM marketplace. The Service application supports both enterprise and small and medium enterprises (SME).

› **Chapter 6**  
This chapter covers the SAP CRM Interaction Center, which is more than just a call center. The Interaction Center provides multi-channel communication interfaces to prospects/customers, and interfaces with the Marketing, Sales, and Service applications.

› **Chapter 7**  
This chapter explores how the SAP Web Channel Experience Management solution can easily open the web as a prominent sales and service channel wherein customers, dealers, and distributors can interact with your business 24/7.

› **Chapter 8**  
This chapter describes the business mobility solutions provided by SAP CRM to keep your employees connected with your core business systems so they can make informed decisions.
Chapter 9
This chapter explains the SAP CRM Partner Channel Management solution that addresses the business network of dealers, distributors, and retailers that are involved in business today. You’ll learn the practical details of channel management and how to implement channels to optimize your channel relationships.

Chapter 10
This chapter delves into the SAP CRM technology landscape, including the original SAP-developed proprietary programming language, ABAP, which has been the workhorse of SAP engines for more than 30 years. You’ll also learn about SAP’s innovative NetWeaver technology that supports your challenging and ever-growing business needs.

Chapter 11
This chapter helps you understand and apply master data as the core fundamental building block of any SAP CRM business process.

Chapter 12
This chapter, along with the previous 11 chapters, will put you in the cockpit and get you ready to take off on your journey into SAP CRM by describing the business solutions SAP CRM offers your industry.

Chapter 13
This chapter uncovers the analytical techniques for identifying your most profitable customers with easy-to-understand examples.

Chapter 14
This chapter explores the SAP CRM 2007 Web Client user interface (UI) that is easy to configure and use to create a robust and flexible CRM business system.

Chapter 15
This chapter covers the various ASAP project methodology variants used in successful SAP CRM implementations to meet particular business and industry verticals.
Preface

› **Chapter 16**
  This chapter provides an in-depth, real-world example of SAP CRM in action. Learn why Canadian Blood Services (CBS) chose SAP CRM to meet its marketing business needs.

› **Chapter 17**
  This chapter presents the background and business benefits of SAP CRM and Business Communications Management implementation at Yaskawa. This case study is a must read if your company is running a call center application and facing business challenges. You can learn from Yaskawa's experience.

› **Chapter 18**
  This chapter will be useful if you're working for a medical devices company. The elaborate case study of SAP CRM service implementation at Intuitive Surgical, Inc., lays out a plan on how to use robust SAP CRM service functionality to achieve excellent customer satisfaction with ease. Furthermore, you'll see how building micro add-ons on top of SAP CRM helps achieve superb automation of field service.

› **Appendix**
  The appendix contains a glossary of the SAP and enterprise computing terminology used in this book.

In addition, the book includes an index that you can use to go directly to certain points of interest.

I hope this book’s straightforward and practical approach will give you the information you need to assess your individual business needs and to determine your own SAP CRM road map for making your implementation a great success.

**Srini Katta, March 2013**
If you want to sell your products (including service products), you need to let customers know what you have to offer. In today's competitive marketplace, getting your products known is essential to your growth. To put it simply, marketing is everything you do to make sure your customers and prospects know about your products and services.

One of the key goals of marketing, therefore, is to generate customer awareness and demand for your products. Like all successful activities, marketing begins with a strategy and a plan. A marketing strategy defines conceptually at a high level how you want to use your limited marketing resources to best optimize brand awareness and sales revenue to create a competitive advantage. For example, perhaps you're a consumer packaged goods company and decide that you want to rely on in-store trade promotions—essentially paying grocery store retailers to prominently display and advertise your products in the store. Or perhaps you're an enterprise software company that decides to launch a television and print media campaign to make a push into the lucrative SME market.
Whereas a marketing strategy defines the goals you want to accomplish, a marketing plan describes the details of how you plan to achieve those goals. With your marketing plans, you decide what your customers should know about your products or services, allowing them to distinguish your products from the many other choices available. A marketing plan is composed of marketing plan elements:

- A campaign contains information such as the campaign objectives, tactics, priority, channel (email, adwords, telephone, mail, print media, etc.), and target market.

- A trade promotion contains information such as the trade funds (or budget), trade activities, maximum price discount, maximum duration, whether there is allowed overlap with other promotions, and so on.

But whether you’re targeting customers directly through campaigns or indirectly through retail trade promotions, the goal is the same: to acquire new customers, to increase your market share of existing customers, and to protect and retain your most valuable customers from competitors.

When people think of marketing, they often focus on outward activities such as advertising and telemarketing that are designed primarily to capture new customers. However, an important but sometimes overlooked role of marketing is to identify and retain a company’s most valuable and profitable customers. Much has been written in the past few years about how it’s 5 to 10 times more expensive to acquire new customers than to sell to existing customers.

Nevertheless, a disproportionate amount of marketing budgets are still focused on efforts to acquire new customers rather than efforts to retain profitable existing customers. This can be a real mistake! Many experts recommend that companies focus most of their marketing efforts on activities designed to increase customer loyalty and to prevent customer churn and defections.

For example, SAP Real-Time Offer Management (which will be discussed later in this chapter) can identify and propose the optimal marketing retention offer for at-risk customers during a real-time customer interaction. On one hand, it’s important to prevent customer
defections by offering an appealing retention offer. On the other hand, with shrinking profit margins and increased competition, companies can’t afford to give away more discounts and incentives than is absolutely necessary to retain a customer. It’s important to pick just the right retention offer that provides enough of an incentive to keep the customer but doesn’t needlessly waste money and resources by providing far more than is necessary.

It’s important for companies to be able to justify marketing budgets by accurately estimating returns on the marketing dollars spent. Companies also need to be able to align and coordinate the marketing activities to ensure effective timing with product releases and such. And to make campaigns really effective, you need to be able to break down your activities by customer segment. This is where SAP CRM Marketing shines. SAP CRM Marketing helps you identify which customers you should target with which of your products. It also maintains information about those customers so you can close your deals more efficiently. So let’s take a look at everything you’ll find in the Marketing component.

SAP CRM Marketing Components

SAP CRM Marketing assists your company in planning, budgeting, executing, analyzing, and optimizing all aspects of marketing and campaign execution. In the next sections, we’ll take a detailed look at each of the eight major components as shown in Figure 3.1.

Marketing Resource Management (MRM)

A successful marketing campaign requires tools and resources that are flexible enough to meet your company’s marketing needs. SAP CRM Marketing Resource Management (MRM) provides the tools to increase the efficiency and visibility of your marketing resources. Marketers have limited resources, and those resources need to be maximized. For example, almost all managers will tell you that they never seem to have enough people, time, or money. Marketing managers, in addition, also need flexibility to respond to changing dynamics. Most marketers would agree that marketing is probably more of a skill—even an art—than an exact science.
MRM manages all the resources that businesses need to run successful marketing campaigns. You can plan and forecast, manage costs and budgets, control digital assets (brands, logos, collaterals, and so on), and publish calendars of marketing events. For example, marketing teams need to know what events are happening when and where—whether it’s a trade show, analyst briefing, web cast, or television or print media campaign. The marketing calendar tool is used as the central entry point for marketing professionals. The tool can be used to view, edit, and interlink campaigns and promotions, as shown in Figure 3.2.
Sales people also need access to the most up-to-date marketing collaterals and assets relevant for their job, while preventing expired or inappropriate collaterals from being accidentally circulated.

**Market Planning and Budgeting**

Any organization’s marketing plans depend on the allocated budgets. Marketing budgets drive your planning options. SAP CRM integration with SAP NetWeaver BW helps analyze past marketing budgets and create a budget forecast based on historical data. You can run budget scenarios with each of the marketing planning scenarios you have on the table. Your marketing planning decisions are based on business needs and marketing budgets. SAP CRM Marketing comes integrated with SAP Project Systems (PS), part of the controlling components of SAP ERP. The marketing planning can be managed either in Microsoft Project (MSP) or in SAP Project Systems (Figure 3.3).
Marketing Resource Management (MRM) is sometimes confused with another marketing concept called marketing automation. However, the two are distinct. Marketing automation, as its name suggests, is primarily concerned with automating processes such as customer segmentation and customer list creation. Often marketing automation is associated with direct marketing and telemarketing. MRM is a much broader and comprehensive approach that gives marketing managers all the tools they needed to run a successful marketing campaign, including budgeting, forecasting, managing digital assets, and managing marketing calendars.

**Segmentation**

Every customer has specific needs and wants. However, groups of customers who exhibit similar attributes and needs fall into what are known as **customer segments**. Customer segmentation—the process of grouping customers with similar attributes into segments that can be used as the basis of marketing campaigns—can be performed using various criteria or attributes.
A video game company is getting ready to roll out two new games in time for the Christmas buying season, and it wants to target customers from its existing customer database with an email or a short message service (SMS) message. One video game is entitled *Axe Maniac on Parole* and is targeted at young males between the ages of 12 and 26 who enjoy violent first-person shooter games. The second video game is entitled *Marathon Shopper: New York City* and is targeted at anyone who bought the *Marathon Shopper: San Francisco* game, as well as female video game players who live in New York or New Jersey. Creating targeted customer segments allows the company to reduce marketing costs (because not every customer will receive the email or SMS) and also helps the company avoid annoying or offending existing customers by offering a game that they are likely not interested in.

The SAP CRM Marketing functionality includes a tool called the Segment Builder that can be used to build target groups for marketing campaigns based on marketing attributes such as age, income, geographical location, hobbies, buying behavior, RFM (recency, frequency, monetary) values, and so on.

The Segment Builder can access customer data from a variety of sources, including SAP NetWeaver BW, SAP ERP, or even rented or purchased customer lists. To speed up the process of searching for and retrieving customer data, the Segment Builder takes advantage of a high-speed segmentation to build target groups using real-time data with the SAP HANA platform. (You can find more information about SAP HANA in Chapter 14.) Additionally, the Segment Builder offers a number of other advanced features such as predictive modeling, dynamic filtering, segment duplication, target group optimization, clustering, data mining, decision trees, and ABC analysis based on profitability and retention scores. We've provided Figure 3.4 so that you can see what the Segment Builder looks like.
List Management

Often, companies buy or rent lead lists from list management companies (e.g., Hoovers, Dun & Bradstreet) or use leads generated by trade shows conducted by channel partners. SAP CRM External List Management (ELM) provides data mapping between source data fields and SAP CRM data fields, duplicate checking (between owned and acquired leads), data cleansing, address validation, measurement of list quality (number of duplicate records, address errors, etc.), and list analysis. ELM helps companies manage customer master records, including cleansing, de-duping, and flagging expired or already used records for deletion (e.g., for rented lists). Of course, list data can be exported to SAP NetWeaver BW and merged with other business data (such as sales data) to track the success of each list.

Example

One SAP customer, an American news agency, had been purchasing expensive third-party lead lists for a number of years. The company had no way of tracking how many of the customer names on the list actually resulted in a sale, but the company was beginning to suspect that the lead lists were not generating significant sales. After implementing SAP
CRM, including ELM and SAP NetWeaver BW integration, the company confirmed that the lists were resulting in very few sales. Rather, almost all of the company’s sales were coming from customers who had contacted the company via its website. Therefore, the agency stopped purchasing the expensive lead list and put more efforts into making their website even easier to use.

Figure 3.5 shows the steps and settings required to import list data from an external file, map the data, process the data, and save the data in SAP CRM using ELM.
SAP CRM Campaign Management provides tools for setting up and running a campaign from start to finish, beginning with market analysis, continuing with the execution of the campaign, and ending with analytics. The results of the campaign then, of course, can be used for planning future campaigns to enable closed-loop SAP CRM. Using the campaign wizard, you can graphically model a campaign and conduct a campaign simulation. An easy-to-use graphical interface provides a clear overview of the campaign process flow, including support for multi-channel and multi-wave campaigns.

For example, you might choose to execute your campaign as an email campaign, a telephone campaign, both, or via other channels such as fax, SMS, and so on. If you're conducting an email campaign, you can use the Marketing Mail Form tool to create email templates to support the campaign. You can also attach surveys to the emails. If you're conducting a telephone campaign via the Interaction Center, you can use the Interactive Script Editor tool to create call scripts to guide the
Interaction Center agents through telephone conversations with prospects and customers. The campaign management application supports both B2B and B2C scenarios, as well as mixed B2B/B2C scenarios. The most typical campaign scenarios are multi-wave campaigns, recurring campaigns, and event-triggered campaigns (Figure 3.7).

![Figure 3.7 The Campaign Management Application in SAP CRM](image)

**Example**

A retail catalog sporting goods company wants to target customers who have signed up for the company’s newsletter on the website but have not yet made any purchases with the company. To entice these new customers to give the company a try, the company might generate an email campaign offering free shipping on orders over $50 when orders are placed within a certain period. The email could also contain a promotion code in case the customer preferred to call the Interaction Center and have an agent assist him with placing the order rather than buy online. When the customer provides the campaign promotion code to the Interaction Center agent, the agent could automatically pull up the correct interactive call script containing details about the promotion. Even
thrive the outbound portion of the campaign was communicated via email and not via the outbound call list in the Interaction Center, the company still had the option to allow the Interaction Center to support the campaign.

The Campaign Management application also provides real-time monitoring of ongoing campaigns and allows managers to adjust campaigns for optimum results. The system provides campaign-specific pricing and supports tracking of sales triggered by a campaign.

**Trade Promotion Management (TPM)**

TPM helps organizations increase the effectiveness of their in-store retail promotions. Many manufacturers spend a significant percentage of their sales revenue on trade promotions—refunds or discounts given by manufacturers to retailers in hopes that the retailer will, in exchange, lower the price of the product and pass the savings on to consumers, generating more demand for the manufacturer’s product.

Trade promotion (also sometimes referred to as *trade spend*) is most commonly associated with the consumer packaged goods (CPG) industry but is also quite common in other retail-based industries, such as footwear, apparel, and consumer electronics. Many recent studies have raised questions about the effectiveness of trade promotions, suggesting that manufacturers aren’t able to accurately track how much revenue results from any particular trade promotion.

Additionally, studies suggest that up to a third of most trade promotion funds go directly to the retailer’s bottom line rather than being passed on to the customer in the form of reduced prices. retailers have been found to use techniques such as forward-buying to buy large quantities of product at a discounted promotional price and then—rather than selling the product right away at a discounted price—holding on to the product and selling it after prices return to their normal levels. National retailers also take advantage of regional trade promotions to buy large quantities at the discounted price in a certain region and then ship the product across the country to their stores in
other locations where the product can be sold at full price. Nonetheless, despite all of these issues, trade promotions have steadily increased over the past 10 years and still seem to be increasing.

SAP TPM addresses these concerns by giving manufacturers the tools to make sure retailers can demonstrate that they sold the required quantity of product in the appropriate retail location. For example, retailers receive compensation only for the units that they can prove were sold from a valid retail location within a valid time period specified by the promotion. This concept is sometimes referred to as pay-for-promotion.

TPM begins with deciding how to use allocated funds—based on sales targets and budgets—across various possible promotions to optimize sales revenue and brand awareness. After the trade promotions are created, you can use forecasting tools to pre-analyze planned trade promotion spending. If things look good, you can release the promotions, which will trigger accruals and fund use. SAP TPM is fully integrated with SAP CRM, SAP ERP, SAP SCM, and Business Process Simulation (BPS) Strategic Enterprise Management (SEM). The integrated TPM system handles creating, executing, monitoring, and optimizing TPM programs at the key account level (e.g., a national grocery chain) as well as in-store promotions (e.g., for a local promotion in your neighborhood grocery store). SAP CRM TPM provides trade funds management, trade spend budgeting, account/product allocation, deductions management, and payment processing (Figure 3.8).

**Example**

An international beverage bottler is spending over 50% of its annual advertising budget (which equates to around 30% of its annual sales revenue) on trade promotions with large retailers such as Sam’s Club, Costco, and Wal-Mart. The retailer has historically invested heavily in trade promotions providing various price discounts, rebates, refunds, free and subsidized in-store displays, and so on. However, the company feels that perhaps only a quarter of the money it’s spending is actually providing measurable results. The company wants more transparency and control over the management of its trade promotions with retailers, as well as stronger optimization, simulation, and analytical capabilities.
Lead Management

So far, we’ve discussed marketing planning, budgeting, customer segmentation, list management, campaign management, and trade promotion management. Let’s assume that your marketing efforts are a mega success, and customers and prospects are responding positively to your campaign. Customers are contacting you via email, phone, and the web, asking for more information. Now you need a tool to capture the leads and customer information. SAP CRM Lead Management functionalities allow you to manage leads across all marketing channels, including telemarketing, email marketing, web-based promotions, and so on.

Lead Management provides capabilities to generate leads on the web as well as to automatically qualify leads or to dispatch leads for qualification using workflow or business rules. You can also automatically generate follow-up activities with reference to leads. As shown in Figure 3.9, leads created in SAP CRM will have the following main fields:
A large international software company uses the SAP CRM Interaction Center to qualify leads generated from trade shows, conferences, and customer events. Inside sales people telephone the customer to assess the level of interest in the company’s products. The Interaction Center agents use a survey tool, which is integrated into the Interaction Center lead screen, to automatically qualify the lead based on the customer’s responses to questions about the level of interest, desired quantity of product, product type, and expected time frame of purchase. If the customer indicates an interest but doesn’t plan to buy for at least six months, the system might automatically qualify the lead as warm rather
than hot. However, if the agent also knows that a competitor is speaking with this customer, the agent might manually qualify the lead as hot. The manual qualification is recorded separately and does not override the automatic survey-based qualification. After the agent saves the lead, the SAP CRM system automatically routes the lead to the responsible sales person using business routing rules that the customer maintained via a tool called the SAP CRM Rule Modeler.

**Backend ERP Integration**

SAP CRM comes with standard out-of-the-box integration with the SAP ERP backend system. You may want to transfer a marketing project and marketing budget to SAP Project Systems (PS), which checks and monitors the marketing costs and sends alerts if you go over the planned budgets or if the planned costs are not compatible with the available funds. You can also set up integration with Controlling & Profitability Analysis in SAP (CO-PA) if you want to enter marketing costs and sales revenue and settle them to CO-PA.

**Marketing Analytics**

SAP CRM is integrated with both SAP ERP and SAP NetWeaver BW, providing closed-loop marketing analytics that measure, predict, plan, and optimize marketing plans. Analytics help you to understand the effectiveness of your marketing activities, allowing you to convert data into actionable intelligence. For example, you can gain insights into why certain marketing activities didn’t work and avoid duplicating them down the road. You can also discover which activities worked well and leverage them again for future marketing efforts.

Various types of marketing analytics are available, including campaign analytics, lead analytics, and trade promotion analytics. For example, you can view reports about customer marketing attributes, CLTV, churn propensity, and customer satisfaction level. Based on this data, you can more accurately predict customer behavior, anticipate customer needs, and generate appropriate marketing messages. See Figure 3.10 for full details regarding the analytical capabilities of SAP CRM Marketing.
The company in this case study is a world leader in digital media creation tools for film, video, audio, animation, games, and broadcast professionals. The company generates about $1 billion in annual sales revenue.

The business challenges facing this company include a standalone marketing system and an apparent disconnect between the marketing and sales departments. These issues make the success of a marketing campaign hard to estimate.

To face these challenges, the company has the following business objectives:

› Monitor campaign effectiveness in real time by measuring the sales revenue generated by a campaign.
› Create integrated marketing analytics that help analyze and adjust the marketing programs.
› Improve overall customer and dealer satisfaction.

**Figure 3.10** Closed-Loop SAP CRM Marketing Analysis Components
On the technology side, the company faces two challenges: integrating the marketing and sales systems, and creating a CRM system that integrates seamlessly with the backend SAP ERP system.

**Solution**

The solution deployed to meet these challenges initially included an SAP CRM 7.0 system, an SAP ERP system, and an SAP NetWeaver BW 7.0 system. The value achieved by deploying this solution included an integrated marketing and sales system wherein a prospect is created and upgraded to a customer when an order is placed. As a result, the customer data redundancy inherent in standalone marketing system was eliminated.

Another benefit is that all of the interactions with the prospect/customer are visible in the customer interaction history.

Finally, the marketing programs are being managed, monitored, and adjusted in real time using marketing analytics.

**Conclusion**

In this chapter, we covered the major components of SAP CRM Marketing. The key things you should remember about this component include:

- SAP CRM Marketing is a comprehensive tool that supports marketing as well as campaign planning and execution using a variety of communication channels, such as telephone marketing, email marketing, web-based marketing, and postal mail marketing.
- SAP CRM Marketing provides all the tools necessary for marketing managers to successfully execute marketing campaigns.
- SAP CRM Marketing is fully integrated with SAP ERP and SAP NetWeaver BW.

This chapter has provided you with the details you need to understand what a great tool SAP CRM Marketing is and how you can benefit from using it.

In the next chapter, we’ll cover SAP CRM Sales.
Index

360-degree view, 247

A

ABAP Objects, 243
ABAP Workbench, 231
ABC analysis, 65, 316
ABC classification, 324
Access sequence, 269
Account and contact management, 78, 79, 285
Account management, 180
Account planning, 180
Actionable intelligence, 298
Activity management, 78, 180
Adobe Forms, 232
Adobe Interactive Form, 233
Advanced Business Application Programming (ABAP), 243
Advertising sales management, 285
AdWords, 154
Agent behavior, 146
Agent desktop productivity tools, 138
Allgemeiner Berichts Aufbereitungs Prozessor, 243
Analytical method, 300
measurement, 300
optimization, 300
planning, 300
prediction, 300
Analytical queries, 301
Analytical scenario
customer, 301
interaction channel, 301
marketing, 301
product, 301
sales, 301
service, 301
Analytics, 74, 298
Application platform, 231
Appointment scheduling, 105
Appointment solutions, 358
ASAP methodology, 348
ASAP phase, 350
Asset management and accounting, 284
Attribute set type, 258
Automotive industry, 274
Available-to.promise, 89

B

Backend ERP integration, 74
Batch management functionality, 276
Billing, 90
Billing and Contract Management, 78, 89
Biotechnology, 280
Blended business scenario, 143
Brand management, 277
Budget forecast, 63
Business analytics, 288
Business application/business engine layer, 243
Business attributes, 264
Business blueprint, 351
Business channels, 29
Business development, 288
Business layer, 242
Business Object Layer (BOL), 242
Business package, 236
Business partner
category, 250
master data, 249
relationship, 253
Business partner classification, 252, 253
account group, 252
competitor, 253
customer, 253
consumer, 253
prospect, 253
Business partner role, 250
account, 251
Business partner role (Cont.)
  bill-to party, 252
  business partner (gen), 250
  consumer, 251
  contact person, 251
  employee, 252
  payer, 252
  prospect, 251
  ship-to party, 252
  sold-to party, 252
Business process integration, 230
Business Server Pages (BSP), 241
Business validation, 347
Business-to-business (B2B), 27
Business-to-consumer (B2C), 27

C

Calendar and task management, 180
Call center, 121, 279
Campaign and trade promotion management, 180
Campaign management, 46, 68, 285
campaign automation, 205
marketing calendar, 205
marketing planner, 205
Canadian Blood Services, 357
Case management, 108, 290
Catalog management, 155
Category management, 278
Central repository, 108
Channel commerce, 198
  partner order management, 198
Channel intermediary, 197
Channel marketing, 198, 204
campaign management, 205
catalog management, 205
lead management, 206
marketing funds, 206
partner communication, 205
partner locator, 207
Channel partners, 195
Channel sales, 198, 208
  account and contact management, 208
  activity management, 209
Channel sales (Cont.)
  channel sales analytics, 210
  opportunity management, 210
Channel service, 198, 215
  complaints and returns management, 218
  knowledge base, 216
  live support, 217
  service order management, 217
Chat, 135
Chemical industry, 275
Closed-loop, 74
  analytics, 299
Clustering, 324
Collaboration room, 203
Collaborative selling, 211
Collaborative showroom, 212
Company culture, 31
Complaint management, 180
Complaints, 112
Condition record, 268, 269
Condition table, 269
Condition technique, 268, 269
Condition type, 269
Configurable products, 157, 256
Constituent services, 289
Consumer products (CP), 276
Contact center, 121
Contract management, 86, 180, 293
Contract pricing, 267
CO-PA, 74
CRM business needs, 29
CRM Marketing
  marketing plan, 60
  marketing strategy, 60
CRM principles, 34
CRM Service
  Contract and Entitlement Management, 103
CRM Service Order Management, 111
CRP methodology, 355
Customer analytics, 324
  churn management, 324, 325
customer loyalty, 324
customer migration, 324
Customer analytics (Cont.)
  customer satisfaction and loyalty, 327
Customer fact sheet, 298
Customer Lifetime Value (CLTV), 37, 93, 232, 324, 326
Customer retention, 60
Customer segmentation, 154
Customer self-service portal, 134
Customer-first, 35, 36
Customer-specific pricing, 266
Cycle methodology, 354

D
Dashboard, 93, 299
Data mining, 298
Delivery-related billing, 90
Demand generation, 154
Design layer configuration, 341

E
E-Commerce, 156
EDI transaction document
  EDI 940, 163
  EDI 945 shipment confirmation form, 163
Embedded analytics, 298
Employee interaction center (EIC), 145
End-to-end deployment, 347
Enterprise business functions, 228
Enterprise Java Beans (EJB), 235
Entitlement Management, 104
E-Service, customer self-service, 167
External List Management (ELM), 66

F
Field sales, 48
  mobile sales, 51
Financial services, 282
Functional design, 346

G
Generic interaction layer (GenIL), 242
Global, 32
Grantor Management, 290
Groupware integration, 238

H
Handheld device, 173
  BlackBerry, 174
Hierarchies, 155
High-tech, 278
Historic reports, 146
Home and home office business (HHO), 28

I
Implementation methodologies, 343
Incentives and commissions management, 78, 90
Incident management, 110
Independent software vendors, 228
Industry vertical, 26
Industry vertical solution, 273
  banking, 274
  financial services, 274
  insurance, 274
  leasing, 274
  media, 274
  professional services, 274
  public sector (government), 274
  retail, 274
  telecommunications, 274
  utilities, 274
In-House Repair, 114
Inquiries, 88
Installed base management, 99
  iBase, 99
  individual object, 99
  iObject, 99
Integration Broker, 230, 234
Interaction Center, 48, 279, 297
  global consolidation, 144
  operations and administration, 146
Interaction channel analytics, 302, 328
  interaction center, 330
  web channel, 329
Interactive reporting, 93
Interactive selling, 157
Interactive voice response (IVR), 131
Internet Customer Self-Service (ICSS), 135
Internet Sales, 152
Intuitive Surgical, Inc., 373
IP-PBXs, 127
IT help desk, 145

J
Java 2 Platform Enterprise Edition (J2EE), 86, 235
Java Database Connectivity (JDC), 235
Java Message Service (JMS), 235
Java Virtual Machine (JVM), 236

K
Key performance indicator (KPI), 230
Knowledge article, 106, 110
Knowledge management, 106, 168, 230

L
Laptop, 177
Large enterprise business, 28
Lead business systems analyst (BSA), 346
Lead list, 66
Lead management, 47, 72
Leads, 88
Leasing, 283
Legacy system, 366
Life sciences, 280
List management, 66

M
Marketing
  automation, 64
  budget, 63
Marketing analytics, 47, 74, 303
  campaign monitoring and success, 306
  campaign planning, 304
  lead analysis, 306
  market budget planning, 304
  market plan analysis, 305
  target group optimization, 305
Marketing plan
  campaign, 60
  trade promotion, 60
Marketing resource management (MRM), 46, 61
Master data, 247
  business partner, 252
  customer, 252
Media, 285
Micro apps, 191
Microsoft Project (MSP), 63
Microsoft Windows, 226
Mobile Application Studio (MAS), 175, 239
Mobile client, 175
Mobile Service
  Laptop solution, 179, 186
  service order management, 186
Mobile system landscape, 176
Model View Controller (MVC), 241
Multi-channel access, 229
Multi-channel integration, 138
Multi-channel interaction center, 126
Multi-level hierarchies, 100

O
Object, 99
  component, 99
Oil and gas, 279
OLTP, 330
Operational planning, 82
Opportunities, 88
Opportunity management, 78, 84, 180
Order to cash, 160
Organizational master data, 261
  organizational attributes and business attributes, 263
  organizational object, 262
Organizational unit
  responsibility, 264

P

Partner and channel analytics, 218
Partner management, 198
  partner compensation, 204
  partner networking, 203
  partner planning and forecasting, 204
  partner profiling and segmentation, 201
  partner recruitment, 199
  partner training and certification, 201
Partner order management, 210
  collaborative showrooms, 212
  distributed order management, 213
  interactive selling and configuration, 212
  POS and channel inventory, 212
  quotation and order management, 211
Pay-for-promotion, 71
PBXs, 127
PDA Companion, 335
Personalization, 155
Pharmaceutical, 280
Planning and forecasting, 82
Point of sale (POS) data, 278
Portals, 236
Positions, 262
Presentation layer, 242
Price optimization, 279
Pricing, 157, 159
Pricing and financial mathematics, 284
Pricing master data, 266
Pricing procedure, 269
Processing of third-party business relationships, 284
Procurement, 163
Product analysis
  product profitability, 328
Product analytics, 327
  cross-selling proposals, 328
Product attribute, 258
Product category, 259
Product configuration and pricing, 78, 85
Product hierarchy, 259
Product master data, 256
  design, 256
Product Modeling Environment, 86
Product relationship, 260
Product search and display, 180
Product type, 257
  financial services, 258
  financing, 258
  intellectual property, 258
  material, 258
  service, 258
  warranty, 258
Professional services, 286
Public sector, 289

Q

Quality notification, 112
Queue levels, 146
Quotation and contract management, 284
Quotation and order management, 78, 87

R

Real-time analytics, 330
Resource planning, 105
  route optimization, 106
  van stock, 106
Retail, 290
Return material authorization (RMA), 112
Returns, 112

S
Sales analytics, 78, 180, 311
  activity management, 312
  billing, 317
  contract management, 314
  opportunity management, 312
  sales funnel, 315
  sales performance, 316
  sales pipeline, 314
  sales quotation and order management, 312
  territory management, 312
Sales application, 77
Sales Configuration Engine (SCE), 86, 267
Sales order management, 180
Sales patterns, 328
Sales planning and forecasting, 78
Sales Pricing Engine (SPE), 86, 267
SAP Advanced Planning and Optimization, 89
SAP Business Communications Management, 49, 127, 368
SAP BusinessObjects Dashboards, 93
SAP CRM, 41
  integrate third-party solution, 360
  mobile applications, 173
  project methodologies, 348
  sales force automation system, 91
SAP CRM Analytics, 52, 297
  Interaction Center analytics, 52
  marketing analytics, 52
  sales analytics, 52
  service analytics, 53
SAP CRM Field Service, 185
SAP CRM Interaction Center, 121
SAP CRM Marketing, 46
SAP CRM Middleware, 238, 252
SAP CRM Mobile application, 297
  Mobile Sales Laptop (MSA LPT), 174
SAP CRM Mobile Sales, 174, 281
  recommendations, 95
SAP CRM on-demand, 42
SAP CRM on-premise, 42
SAP CRM Partner Channel Management solution map, 45, 197
SAP CRM Rule Modeler, 85
SAP CRM Sales, 47, 78
  activity management, 177
  analytics, 92
SAP CRM Service, 98
SAP CRM Service Analytics, 115
SAP CRM Service Manager, 190
SAP CRM Web Client UI, 156, 242, 338
SAP Enterprise Portal, 226
SAP ERP, 42
  integration, 374
SAP ERP Sales and Distribution (SD), 252
SAP HANA, 65, 330
SAP Incentive and Commission Management (ICM), 204, 282
SAP Internet Pricing and Configurator (IPC), 86, 157, 160, 267
SAP Mobile BI (NetWeaver), 175
SAP Mobile Time and Travel, 78, 92, 180
SAP NetWeaver, 225
  integration, 228
  TREX, 232
SAP NetWeaver Application Server, 229, 231
SAP NetWeaver Business Process Management, 230
SAP NetWeaver Business Warehouse (BW), 82, 226, 230, 232, 298
SAP NetWeaver Master Data Management (MDM), 230, 248
SAP NetWeaver Mobile, 226, 229, 234, 337
SAP NetWeaver Portal, 229, 232, 236
SAP NetWeaver Process Integration (PI), 226, 230, 234
SAP Partner Directory, 203
SAP Price and Margin Management, 268, 279
SAP Project Systems (PS), 63, 74
SAP Real-Time Offer Management (RTOM), 60, 140
SAP Solution Manager, 348
SAP Strategic Enterprise Management (SEM), 93, 312
SAP Web Channel Experience Management, 48, 151, 292
E-Commerce, 152
E-Marketing, 152
E-Service, 152
Web Channel Analytics, 152
Sarbanes-Oxley Act, 280
Segment and list management, 46
Segment Builder, 65
Segmentation, 64
customer segment, 64
Service analytics, 115, 318
service quality, 319
Service Contract Management, 104
Service level agreement (SLA), 103
Service management, 169
Service order, 111, 279
Service order management, 108, 180
Service request, 111
Service request functionality, 374
Service Request view, 109
Service Resource Planning, 105
Service ticket, 279
Service-oriented architecture (SOA), 226
Shared-Service Center, 144
Shelf management, 180
Small and medium business (SMB), 28
Smartphone, 173, 337
SOAP, 230
Software as a Service (SaaS), 56
Solution Database (SDB), 234
Strategic planning, 82
Subscription sales, 285
Survey integration, 88
Sybase Mobile Sales, 188
application for SAP CRM, 174
Sybase Unwired Platform, 173, 188

T
Tablets, 335
Taxes, 86
Technical design, 347
Technical migration, 126
Telecommunications, 291
 provider order, 292
Telephone system hardware, 126
Territory management, 78, 83, 180
Text Retrieval and Extraction (TREX) engine, 106
Third-party fulfillment, 163
Three pillars of SAP CRM, 43
TimeTrade, 358
Total cost of ownership (TCO), 31
Trade Promotion Management (TPM), 47, 70
Transaction Tax Engine (TTE), 86
Transaction-related billing, 90

U
User acceptance testing (UAT), 347
User access mode
desktop/PC, 334
handheld, 337
laptop, 334
notebook computers, 334
User access modes, 334
Utilities, 293
Interaction Center, 293

V
Variant configuration, 268
Variant pricing, 268
Vendor integration, 284
Virtual interaction center, 122
Virtual Machine Container, 231
Visit planning and route optimization, 180
**W**

Warranty claims, 102
Warranty Management, 101
Web auctions, 166
Web callback, 132
Web Channel, 297
Web Channel Analytics, 170
Web form, 133
Web service, 227, 232

Web Service Description Language (WSDL), 232
Windows Mobile SE, 335

**X**

XML, 230

**Y**

Yaskawa, 365