A Study of Customer Relationship Management and Its Application to Hannum, Wagle and Cline Engineering

An Honors Thesis (HONRS 499)

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This paper is the final requirement of the Ball State University's Honors College and is to be completed to cap off the Honors curriculum. The goal is to develop a written project within the student's major of study that sheds light on a problem where the student can apply knowledge gathered throughout their college career in an effort to develop a solution to that problem. I chose the topic of customer relationship management because it is a recent topic within the information systems and technology field and could be applied to my present place of employment theoretically. The first portion of the paper will discuss the increasing importance of customer relationships. This will then carry over into the advantages of implementing a system to control customer relationship management. Finally, the possibilities of introducing such a system to Hannum, Wagle & Cline Engineering will be analyzed.
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Introduction

Hannum, Wagle & Cline is a full service engineering and architectural firm with office locations in Indiana and Illinois. It is a spin-off of Garmong Industries, a construction firm based in Terre Haute that has been doing business since 1923. Three professional engineers fostered its conception in 1989. Consequently, David L. Hannum, Ralph E. Wagle, and Michael R. Cline still own controlling shares in the company and are very active in its progression to becoming one of the premier engineering firms in the Midwest.

This firm provides consulting services for the planning, design, inspection, and financing of wastewater collection and treatment systems, water resources/treatment systems, and transportation and building projects. The staff, comprised of the finest engineers, architects and surveyors available, specializes in providing practical, cost-effective solutions for clients' engineering problems. By combining our engineering expertise with an excellent understanding of funding programs and regulatory agencies, we contribute valuable experience to effectively help plan, finance, design and build our clients' projects, on time and on budget. Since the beginning, the success of Hannum, Wagle & Cline (HWC) has been founded on the principles of honesty, integrity, and commitment to our clients. These principles continue to be the foundation of our business.

During a recent strategic planning meeting, the marketing staff was asked to contribute ways in which HWC could enhance its service. Among those mentioned, the use of technology was brought up. This led to a discussion of how technology was currently being used within the firm. While there is heavy computer usage in the offices
(CAD work, accounting, miscellaneous secretarial duties, etc), little is done at the front end that could entice the customer to notice our firm. HWC currently maintains a static web page with limited uses. It is considered a tool to show interested parties how to apply for work or view past projects completed. HWC currently has no established network, but is determined to tie its six offices together eventually in an effort to better manage information within the organization.

While this is not completed, I was asked to explore the options of a front-end system that could be implemented within the next five years that could help utilize our resources better in so far as dealing with our customers. This paper comprises work I completed in response to that request. I researched enterprise resource planning (ERP) tools and noted that there was a considerable buzz surrounding the topic of Customer Relationship Management (CRM). Discovering its usefulness to a company of any size, I compiled an informative report about its functionality and possible vendors who would be willing to assist our company in installing such a system. Then I discussed ways that we could adopt a customer-focused approach to doing our business based on various research of the topic.

**Customer Relationship Management (CRM): What is it?**

"Delivering high quality service and achieving high customer satisfaction has been closely linked to profits, cost savings, and market share" (Sager 124). In today's fast moving and competitive market, products come and products go. For companies large and small, the most important real asset with measurable long-term value is loyal, one-to-one customer relationships. Strangely enough, this very important asset does not show up on any company's balance sheet.
The primary reason that the company's financial system do not account for this critical asset is simply because there seems to be no accepted method in place to measure it. Since no real method is in place, this study involves "less than exact" customer relationship management tools (e.g. surveys, interviews, etc). Furthermore "with the focus on the customer, leading companies today are overhauling their traditional financial-only measurements of corporate performance, and seeking new metrics (both internal and external) that include customers perceptions and expectations" (Anton 2).

**Customer Relationship Management (CRM): Why should a company know about it?**

To help answer this question, here is a look at some statistics. Companies within the United States lose half of their customers every five years (Harvard Business Review, March/April 1996). Using CRM can help retain more customers. A large bank learned that 20% of their customers contributed to 150% of their profits. Between forty and fifty percent of the bank's customers eliminate 50% of the profits. The remainder contributes nothing to the profit picture (First Manhattan Consulting Group). CRM can help identify who profitable customers are and help figure out strategies to convert more customers to profitability.

The cost of making a sales call and acquiring and keeping new customers goes up every year. CRM integrates with sales force automation software (SFA) that helps to manage the sales force, track prospects throughout the sales cycle, and control sales costs. By integrating all the customer contact information from marketing, to sales, to support, one could efficiently manage the entire customer life cycle. The easiest new
sales to make are to existing happy customers. Above all else, CRM systems are about making existing customers happy and helping to increase revenue and profit per customer.

If a Customer Relationship Management system can do all these things, (or even only a few of them), it can make a significant impact on a company's revenue and profits. In a little over the last five years, enterprise resource planning (ERP) systems have been used to make a company's back-office operations more efficient. Although this can have a significant effect on a company's bottom line, if there are no happy customers buying services from our company, we will not be in business long.

So, how does a small business reap the benefits of a Customer Relationship Management system? To answer this, we need to come up with a definition of exactly what a CRM system is. As with ERP systems, the definition of CRM changes depending on which vendor or analyst talked to. (Companies are also inventing their own terms for CRM like Enterprise Resource Management (ERM) or Customer Asset Management Information Systems (CAMIS). Here is a definition that has been compiled from a number of sources that accurately describes what a CRM is:

Customer Relationship Management software, or CRM, is a set of applications designed to help:

- **Understand key customer groups and establish long-term relationships with customers**
- **Discover what customers need and value, and to get to know customers well enough that a company could engage them in one-to-one marketing**
- **Identify customer groups to target for new or add-on sales**
Define products and services to meet the customer's needs

Increase the company's sales while improving customer satisfaction

Optimize relevant delivery channels

Monitor and review the customer's response to particular efforts

This is a fairly broad definition of the benefits to be derived from implementing and using a CRM system. But what exactly would HWC be implementing if they purchased a CRM system? Although each vendor's product suite is different, here are some of the most common components of the leading CRM systems:

- **Customer Information System (CIS)** - Database systems designed to store information about customers.

- **Data Warehouse** - A centralized repository of business data. Data warehouses consolidate information from multiple sources in order to attain a consolidated view of the customers and business.

- **Data Mining** - Used in conjunction with a Data Warehouse, Data Mining tools are sophisticated tools for searching large volumes of data and looking for patterns that will predict the behavior of customers or prospects. (Data Mining tools were used to find the information on the profitability of banking customer that was described earlier.)

- **Marketing or Campaign Management Systems** - Since customers start out as leads or prospects, a complete customer life-cycle management system must start tracking customer behavior starting with the first marketing campaigns targeted at a lead. Campaign Management Systems automate the planning, execution and assessment of marketing programs. These
systems work with data stored in a data warehouse. By hooking a marketing system into a CRM system, HWC can learn what conventions or trade shows attended resulted in the most new customers, what factors led the prospect to become a customer, etc.

- Sales Force Automation (SFA) - Sales Force Automation encompasses tools used by a sales force and sales management to track sales activities. Since customers start out as sales prospects, SFA is often included in, or linked to, a CRM.

These CRM applications are part of what is also called front office applications. Front office applications (or customer-facing applications) are applications that are used to affect how the company interfaces with its customers. Back office applications (or internal-facing applications), are applications that are used to affect how a company would manage and control its operations. Back office applications are things like Financial, Human Resources, and Logistics; the basic applications in an ERP System.

Today, all the major ERP vendors are looking at front office applications like CRM as a key to continuing their revenue growth. According to the Forrester Group, the market for front office applications was about $1 billion in 1998 and is growing at a compound annual growth rate of 54%. This makes the front office application market as big or bigger than the current ERP market.

To become players in this large market, the major ERP vendors are investing heavily in front office applications and CRM. According to the Meta Group, Oracle and SAP are reported to have as many as 800 developers each working on CRM applications. But even with this magnitude of investment, it will not be easy sailing for
the ERP vendors. Several very strong players who have been involved in the customer service industry for years dominate today's CRM market.

**Customer Relationship Management Applied to Small Businesses**

Small businesses have just begun to take their first tentative steps towards doing business on the Internet, but many believe they will soon have to use the Net to improve customer service. Indeed, according to a survey by Cahners In-Stat Group, 82% of small office/home office (SOHO) businesses (fewer than five employees) and 61% of small businesses (five to 99 employees) say the Internet has increased the need for them to improve customer service.

New Internet-based CRM technologies provide several attractive means for companies to tighten their relationships with customers:

- **E-mail response management** – Automatically acknowledges customer inquiries and can provide prescripted answers to questions based on a Frequently Asked Questions (FAQ) database with human intervention to ensure accurate responses.

- **Web callback** – Enables customers to get quick phone response from customer service representatives by providing their phone numbers online.

- **Live chat** – Representatives aided by a database of FAQ answers can cut and paste responses from pre-written choices. Customers get immediate responses.

- **Web collaboration** – Links the customer's browser with the representative's so they view the same page as the customer and can help him navigate the site.
• Dynamically generated self-help – A dynamic FAQ application using keywords to search a database that provides content tailored for individual Web pages.

• Voice over IP (VoIP) – Customers talk to representatives through the site without having to pick up a telephone.

Many small companies still do not have Web sites, and of those that do, most offer bare bones static marketing sites (like HWC's). Few small companies have the time or know-how to implement Web CRM technologies, however, they may soon be able to use some of them by buying services from telecommunications companies and other service providers. Many firms have emerged recently aiming to capitalize on how these businesses develop and grow online, including the use of Web CRM.

"Most companies today are underutilizing information technology, and therefore 'missing the boat.' Today's winners are capitalizing on available information technology to meet the customer challenges facing their organizations, and as a result, the winners are better and faster and cheaper and newer than their less technology-nimble competitors" (Anton 3). Many small businesses already use e-mail for inquiries that are not time sensitive. In fact, e-mail is the number one form of contact used by customers. Toll free telephone service without call center support was the second most popular choice, according to an In-Stat survey. Over 80% of small businesses have a strong interest in performing customer service over the Internet. More than 85% of them also say that it is critical for them to integrate Web CRM applications with existing systems to provide effective online customer service. In-Stat believes that small businesses will also need to integrate Web-based CRM systems with voice-based systems.
Few businesses can afford to ignore Web CRM applications. Even the smallest businesses will need to utilize at least some of these technologies, says Kirsten Cloninger, In-Stat industry analyst. “Online customer service is quickly changing from a competitive differentiator into a competitive necessity,” Cloninger says. “The immediacy of the Internet has raised consumer expectations for quicker response times and more personalized interactions.”

**Short List of the Leading CRM Vendors (in alphabetical order)**

**Clarify**- Clarify's product suite, FrontOffice v 10.0 covers all aspects of the customer life cycle across their front-office operations, including call centers, sales and marketing, customer service, quality assurance, field service and logistics, and help desks. Clarify's integrated suite of customer interaction software provides a single source for all customer information. Clarify was founded in 1990 and is headquartered in San Jose, California with sales office worldwide.

**Siebel Systems**- Siebel Systems, Inc. in conjunction with SLP InfoWare, is the world's leading supplier of Enterprise Relationship Management systems (they claim 70% worldwide market share). The company's products, called Siebel Enterprise Applications, provide large, global organizations with customer life-cycle management including sales, marketing, and customer service information systems. Siebel was founded in 1993 and is headquartered in San Mateo, California and has sales office worldwide.

**Vantive** - Vantive (of PeopleSoft fame) is a worldwide leader in the front-office automation software market. Vantive Enterprise is an integrated suite of Web-enabled software that automates sales, marketing, call center, and field service operations.
Vantive Enterprise applications can be used independently or as part of an integrated, enterprise-wide front office application system. Founded in 1990, Vantive is headquartered in Santa Clara, California, and distributes its products from offices worldwide.

Details Associated with Vendors on the Short List

Clarify

Nortel Networks Clarify Service Solution allows companies to maximize customer loyalty and profitability through the creation of personalized selling strategies and programs. Clarify Service Solution lets companies increase the quality of service they provide their customers while simultaneously leveraging their customer information for increased opportunities for targeted up-selling and cross-selling.

The information provided through the Clarify Service Solution provides companies with a vast amount of information that can be used to create new selling environments with increased profitability. The Clarify Service Solution is a comprehensive offering that integrates seamlessly with eFrontOffice to close the loop in managing customer service interactions.

Features and Benefits

- Nortel Networks ClearContracts for the automation and streamlining of key contract information and processes, including complex quoting, renewals, financial management, and entitlement to tracking.
- Nortel Networks Clarify ClearSupport allows call centers to manage information flow within a service organization so that customer needs are handled quickly and
efficiently, using features such as configuration control, a problem resolution system, and ownership and commitment tracking.

- Nortel Networks Clarify ClearQuality identifies, traces, catalogs, and verifies repairs to continuously ensure that the quality and efficiency of technical products improve over time and efficiency of technical products improve over time and bug fixes are prioritized according to SLAs.

**Siebel**

Together, Siebel Systems and SLP InfoWare enable clients to manage customer interactions across multiple channels through Siebel eCommunications 2000 and to optimize these interactions by leveraging the predictive knowledge built on SLP InfoWare’s Predictive CRM platform. This knowledge predicts risks (churn, bad-debt) and opportunities (upsell/cross-sell) in real-time and provides optimal online recommendations.

The SLP InfoWare integration to Siebel eCommunications 2000 integration contains graphical components embedded in Siebel views that provide behavior predictions and recommendations. These have been computed in real-time through HTTP requests into SLP InfoWare’s Customer Knowledge Hub. Customer online profile requests are handled using SLP InfoWare’s Knowledge Base Reasoning System.

SLP InfoWare’s Predictive CRM platform enables organizations to explore customer behavior and automatically create predictive knowledge (behavioral models, business rules) with the 24x7 Modeler, distribute this knowledge enterprise-wide through a Customer Knowledge Hub, and leverage this knowledge with the 24x7 Marketer, to optimize push/pull customer interactions.
When combined with SLP InfoWare's Predictive CRM platform, customer interactions handled through Siebel eCommunications 2000 can be optimized by leveraging online behavior predictions and recommendations. Such optimization provides customers with a fast response time and enables organizations to further develop customer loyalty and value.

**Features and Benefits**

- Constantly shows real-time behavior predictions such as customers’ likelihood to churn, accept upsell and cross-sell opportunities, and exhibit payment risks.
- Recommends offers and actions in real-time, based on customers’ predictive profiles, to increase customer interaction efficiency.
- Automatically creates highly accurate models predicting critical customer behaviors such as bad debt, responses to past offers/actions, and churn.
- Stores predictive knowledge in an active repository – Customer Knowledge Hub – accessible by collaborators and front-office systems.
- Enables marketers to manage and optimize push/pull campaigns through predictive knowledge enterprise portal, 24x7 Marketer, across channels handled by Siebel eComunications 2000.
- Optimizes customer interactions through real-time behavior prediction and action recommendations to further develop loyalty and value.
- Automatically creates highly accurate predictive knowledge through advanced data-mining and machine learning techniques.
- Automates the predictive knowledge-based optimization of marketing/customer service campaigns handled through Siebel eCommunications 2000.
• Optimizes marketing campaigns through proactive targeting and offers recommendations to increase corporate objective achievement rates.

• Offers organizations the opportunity to capitalize on customer knowledge through the Customer Knowledge Hub.

**Vantive**

PeopleSoft eSupport for Customers provides customers with 24-hour, worldwide access to PeopleSoft CRM Support via a standard web browser. PeopleSoft eSupport for Customers enables customers to submit new cases, check case status, review service agreements, or search for resolutions – whenever and wherever they need assistance.

Web technology enables a company to offer more than just convenient access to its eCustomers – adding a bi-directional flow of information that creates customer dialogue. Self-service Web applications take this further by allowing customers to transact issues and receive immediate responses. The benefits of self-service Web capability to a company are many. These applications are easy to install, customize and maintain, and operate using open industry standards like Hypertext Transfer Protocol (HTTP), Hypertext Markup Language (HTML), and Extensible Markup Language (XML). However, the most significant benefit is the enabling of personalized, one-to-one marketing utilizing role-based interfaces and providing a historical record of the transactions in the relationship.

Through a friendly, familiar browser interface, end users get access to information related to their job function or role, when they want it, without costly training or setup time. Over time, as the relationship turns the self-service eCustomer into a
self-sufficient customer, companies reap the benefits. Migrating eCustomers to self-sufficiency reduces maximum flexibility for the relationship. Migrating our employees to a form of a self-service help desk application provides similar benefits. To optimize the user experience of empowerment, we need a well-designed technology framework to extend customer service, help desk, and front office capabilities to the Web.

Features and Benefits

• Ease of Use – Training costs and learning curves for users are minimized by an easy-to-use, intuitive interface. Screens, page design, layout, usability, and navigation reflect human factors design principles. Easy integration to Web-based public information sources and services (such as directions, finders, mapping services, and search engines) enriches the user experience.

• Pure Browser Client – With only a Web browser on the client side, performance is fast, software is simple to maintain on the server, and training is nearly eliminated.

• Personalization – Each application acts as a portal to its counterpart application in the suite. Users control the sections, order, and content of their home page – avoiding information overload and assuring user acceptance and productivity.

• Cross-browser Support – To reach the largest number of potential users, the applications should support Netscape and Microsoft Internet Explorer browsers on Windows, Macintosh, and UNIX client platforms.

• Fast Deployment – Each Web application provides complete functionality needed to support the target user – out-of-the-box. Web-based architecture makes it possible to provide quicker remote access for users compared to other access methods such as mobile laptop clients.
Ease of Customization – Applications can be customized and extended using an object-based development environment – extended by best-of-breed Web tools such as Microsoft Visual InterDev – which leverages widely available skill sets.

Lower Maintenance and Cost of Ownership – The data-driven nature of the product facilitates a server-centric Web application architecture supporting a browser-only, zero-install client interface, with no large ActiveX or applet downloads required at run time for data access and session management. This requires lower IT staffing and infrastructure.

Customer requirements – focusing on end user needs and usability – streamline Vantive Enterprise application to the functionality required by eCustomers.

A pure browser client provides lower total cost of ownership

Tight integration with Vantive Enterprise applications boosts user self-sufficiency.

Platform independent technologies, including client-side DHTML and server-side Java Server Page (JSP), provide a flexible environment, easy customization, and maximum scalability.

Use of standard Web development tools reduces development and learning curves.

Using applications as templates allows for customization with the Vantive Objective Studio tool set.

Measuring Results of CRM

Positive results of a successful CRM implementation will be tangible, and reflected in metrics reports. Metrics analysis tools are available from these vendors, but most CRM applications and solutions providers will include or specify a reporting solution. Ultimately, an CRM system’s impact can be quantified in terms of 1) value as
a customer service system (by measuring cost per user and customer satisfaction levels) and 2) revenue growth. Evaluating costs per user, per lead and per transaction is relatively straightforward and calculable through client/server metrics reports.

Gauging customer satisfaction with a CRM system can be accomplished through field surveys that prompt users' feedback (electronically) and provide insight into the effectiveness of specific customer sales and support objectives. Application-based field surveys are contained in the CRM application interface, typically accessible from the customer's desktop. A feedback form is easily accessible and available at all times.

Push- and pull-based systems provide questions dynamically to the user through an active Internet connection and implementation of direct-to-user update technology such as BlackWeb. User responses can then be used to gauge the overall user experience, determine the effectiveness of the application and its services, and assist in product research and development. Most importantly, every single transaction in a true CRM environment, whether a sales- or support-related transaction, is an opportunity to build loyalty and profit.

**Pitfalls in Implementing CRM Solutions**

The initiation of a CRM, much like introducing any new ideas into any situation, brings about drawbacks and other hindrances that should be considered. The number one item on such a list would be the failure to gain top management support and involvement. If a project champion cannot be sought out, a new idea to enable reengineering within a business function could die. In that same vein, hurdles that could stymie the progress of new developments include inadequate team involvement in the initiative and scrimping on training and support. Insufficient planning and resources
could lead to the automation of a manual process that was dysfunctional to begin with.

This again points out that when tackling a project of this proportion, there is more than just an adjustment in strategy here or a changed plan there. It involves a shift in company focus towards a customer-centric outlook. It also involves a severe commitment to technical training and support no matter what CRM option is chosen.

**Determining the Customer-Focus**

If Hannum, Wagle and Cline wishes to grow in an effective and efficient manner, there must be a move to incorporate this type of system into our strategic plan for the years to come. In addition to this, HWC could benefit from “creating a customer-focused culture.” Guidelines for implementing this were outlined by Mr. Anton as follows:

1. Define all your business in terms of continuous service to your customers, from pre-sales to post-sales activities.
2. Identify and differentiate customers in terms of their roles, power, special characteristics, and needs.
3. Determine customers' prioritized expectations related to service product attributes (performance and perception) and outcome.
4. Continuously measure the degree to which expectations are met (perceived value).
5. Maintain a current description of the service creation and delivery process with charts, text, and measures.
6. Establish and maintain internal and external metrics, to manage the customer relationships. (Anton 132).
In an effort to tackle the first two steps, HWC could change the emphasis from structure and systems to innovation, cross-functional thinking, and decentralized, strategic decision making. Flatten the organization and bring it closer to the customer. Think like a customer. No business can expect to satisfy every customer, therefore target very specific services for very specific, niche, target, customers. HWC in association with Garmong are attempting to do this very tactic with our Design/Build campaign. New people have also been brought into the organization to inject fresh thinking and to be catalysts in the drive to change.

In response to steps three and four, HWC could put in a holistic process for implementing change, a new method of working, that transcends the barriers, the "old baggage," and the mistrust and fear of change. HWC must manage the customers' experiences by actively soliciting feedback and acting on it promptly. Identify the costs and the output of every process, and then measure the impact of this on customer value, employee value, and shareholder value.

Steps five and six of this list call for continual training, educating, and developing people as a strategic priority. Customer-satisfying service makes money, and it also saves money. Keeping customers reduces marketing expenses, since not as many new customers are needed. Money not expensed to marketing equals profits retained. Foster curiosity and constant desire to improve among employees, an objective that is well within the reach of all companies. The reputation of a company rides not only on the talents of management but equally on the communication skills of employees. The customer's perception of the company's staff is the public image of the entire company. Metrics that could be developed to track customer relationships would involve a record
of complaints about projects, miscalculations for materials for projects, mistakes in planning, or anything of that manner.

**Conclusion**

The rewards of executing an effective CRM program are largely self-evident: increased customer value, higher customer retention, increased customer recruitment, and higher profitability. “Every study performed to date indicates that companies that focus on the customer become the industry leaders in both profits and market share” (Anton 14). The traps and pitfalls or lessons learned are equally important as they can affect the outcome and prevent a CRM from achieving its potential. The following are some recommendations for HWC to consider:

- Start with a clear vision of a customer-centric, as opposed to a product-focused approach.
- Remain focused on a disciplined and structured marketing process driven by detailed data.
- Retain business focus – do not get distracted by the technology involved.
- Ensure the technology infrastructure can adequately capture and track promotional history and customer responses to campaigns.
- Recognize that multiple steps may be required to move from the current state to the ideal.
- A marketing warehouse infrastructure must exist for any serious CRM initiative.
- Data mining and analytical tools add complexity to a marketing warehouse but provide powerful behavioral segmentation insights efficiently.
• New campaign management technology can augment previous investments in targeting and other marketing programs.

• Finally, reduce the risk associated by building a project team made up of business users, IT professionals, execution management, and external consultants an appropriate.

Whether or not CRM is implemented at HWC soon may not appear to be important. But, the time will come within the next five years when this use of ERP technology will be paramount to the survival of a company. It will not matter what professional area they are in, who their customers are, or what the overall size of their operation.
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