

3 Reasons Why CRM Built on SharePoint Maximizes ROI

 BPA Solutions

Executive Summary

Limited resources and a demand for double-digit return on investment (ROI) require managers to define projects that can leverage multiple technologies to achieve compounded results.

In its "Technology Trends 2014" survey, Computer Economics identified Customer Relationship Management (CRM) systems as the most low-risk/high-reward technology trend, based on cost predictability and ROI. The ROI of CRM can be extended even further by developing it on top of the powerful Microsoft SharePoint platform.

Strong contact management capabilities (such as contact information and history, as well as relations between contacts, companies, opportunities, and partners) are core to any CRM program, but that is only the beginning. Recently, CRM vendors

have added many functions that historically resided outside the domain of CRM. These include document management capabilities, contracts management, mail merging for campaign management, quotes generation, e-mail management, tasks, calendaring, collaboration, and social networking.

This white paper will detail three reasons that enterprises can achieve tremendous savings (up to 90%) and increased efficiencies by utilizing SharePoint capabilities with CRM functionality built on top

Reason #1: SharePoint Is a Powerful Foundation

First, let's look at the numbers. Microsoft reports that SharePoint is their most successful server product ever, with 36.5 million user license sales reported between the years 2006 and 2011, and an estimated \$2 billion in total annual sales as of 2013, leapfrogging Oracle and moving ahead of IBM. Sixty percent of US companies have a SharePoint environment deployed somewhere within their organization, and nearly 80% of all Fortune 500 companies have purchased SharePoint, according to Gartner. SharePoint has won the battle for the enterprise, and chances are that your company has already invested in SharePoint.

What does this business volume mean? SharePoint is a trusted, top-rated product that will be around for many years to come. It is well-vetted and reliable, with all the optimization that mass implementation can provide. If you're thinking of adopting or growing this technology, you're backing the right horse.





SharePoint's built-in functionalities

Apart from content storage, SharePoint offers many functions for enterprise content management, collaboration, search-driven application creation, social engagement, business process automation, and business intelligence.

SharePoint allows publishing to multiple formats such as intranet, extranet, and internet, and also mobile and tablet. It provides some powerful new capabilities for organizations that need to disseminate content across multiple environments, but who may also need the ability to present that content in formats designed specifically for the tablet or mobile experience.



Office and Exchange integrations are native. The polished user interface makes SharePoint easy to understand. The drag-and-drop capability makes SharePoint a much more fluid and pleasant experience. Similar to the Windows Phone experience, adding tasks and deadlines to your profile generates reminders and data rollups that are provided each time you log in.

SharePoint allows powerful search, whether data is on premise or in the cloud. With Enterprise Search, users can sift through content not only within the SharePoint repositories, but also in external content storage. It can even be extended to include external applications.

In addition, SharePoint provides influential business intelligence. Dashboards allow users to develop reports, key performance indicator (KPI) metrics, and other analytics in a simple manner to improve the visibility of performance indices, providing the key ingredient to an improvement feedback loop within the organization.

By leveraging the built-in functions provided by SharePoint, organizations can reduce the number of custom applications—along with the time, effort, and cost for their development and maintenance—while improving and standardizing user experience and greatly simplifying the enterprise technology sprawl.





Reason #2: CRM Alone Delivers Outstanding ROI, Even Before the Added Power of SharePoint

As noted earlier, Computer Economics identified CRM systems as the most low-risk/high-reward technology trend in its “Technology Trends 2014” survey, based on ROI as well as cost predictability. Flexibility, quick deployment, and cloud-based technology all help keep initial CRM investment costs low. The returns—increased sales and better customer relationships—make CRM technology the smartest investment your organization can select.

In its 2013 CRM Benchmark Report, Nucleus Research provides compelling statistics that build a solid business case for a CRM deployment that takes into account sales, marketing, and customer service automation: the “three pillars” of CRM.

According to the report:

- 87% of companies surveyed reported benefits from sales force automation.
- The average company surveyed saw a 4.5% increase in productivity from sales force automation applications. For example, in an organization with 20 sales representatives, savings would be as high as the annual cost for one fully loaded sales rep.
- The average company surveyed also saw a 4% increase in profits and a 3.6% reduction in administrative expenses (such as sales support staff) as a result of sales force automation.
- 68% of the companies surveyed reported an increase in profits as a result of deploying marketing automation.
- 82% of companies reported achieving agent productivity benefits from their customer service automation deployment.

As a result, we see primary benefits across the board, including:

- Increased productivity.
- Reduced administrative overheads.
- Higher profits.
- Lower customer churn.

The numbers speak for themselves. CRM deployments, especially customer service automation, deliver value and a solid ROI.

The History of CRM and SharePoint

Until now, most companies have not known that a full CRM application on SharePoint existed. To meet the unique needs of their businesses, IT departments would develop a custom CRM application on SharePoint. These in-house development projects were typically hard-coded, without much room for flexibility as business needs grew, and were difficult to maintain in the long run, because application-building was not a core strength of the business.

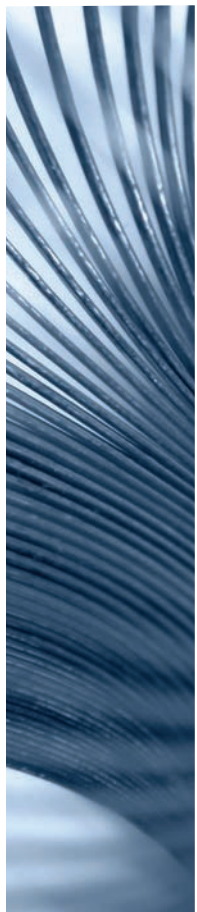
Fortunately, the CRM market has recognized and harnessed the power of SharePoint. Buying an out-of-the-box, SharePoint-compatible CRM (versus developing an in-house, custom CRM on SharePoint) makes much greater financial sense, and speeds time to deployment.

SharePoint excels at document management, search, and collaboration, but lacks simple and powerful relationship data management. Interfaces (such as BPA's xRM platform) allow

for easy data relationship management, providing the flexibility required by the constantly changing face of business. SharePoint 2013's prowess lies in its strength as a stable platform—a large user base, an extensive pool of technical resources, and proven technology with very valuable features and functions.

CRM is part of the tools-dominated landscape. CRM developers such as BPA Solutions recognized the need early for a total solution, from campaign management (for lead generation) through the sales process to total post-sales customer satisfaction. Leveraging the clean user interface and the overwhelming presence of the SharePoint platform to support a powerful, integrated CRM system was a logical next step.

It's Time to Merge SharePoint and CRM as One Powerful Solution



In Summary:

Why SharePoint?

- SharePoint is a trusted technology, used by many companies.
- SharePoint has unique built-in functionalities needed for a powerful CRM system, such as collaboration, social tools, document management, and workflow management.
- SharePoint is natively integrated with other Microsoft technologies such as Office, Exchange, Yammer, Lync, and Skype to create maximum user productivity without changing end user tools and habits.
- SharePoint is already accepted by end users.
- SharePoint is coherent with IT strategies to reduce costs and number of tools.

Why Add a Pre-Built CRM?

- SharePoint is a powerful framework, but does not provide a “data entry ready” CRM application.
- Developing with SharePoint is complex and requires competencies in many languages and technologies.
- The cost of in-house development and maintenance is expensive, and time to deployment is long.
- CRM developers have identified and integrated non-traditional information and tools (document sharing, search capability, and collaboration) into traditional CRM to transform it from a contacts database into a revolutionary business intelligence tool.

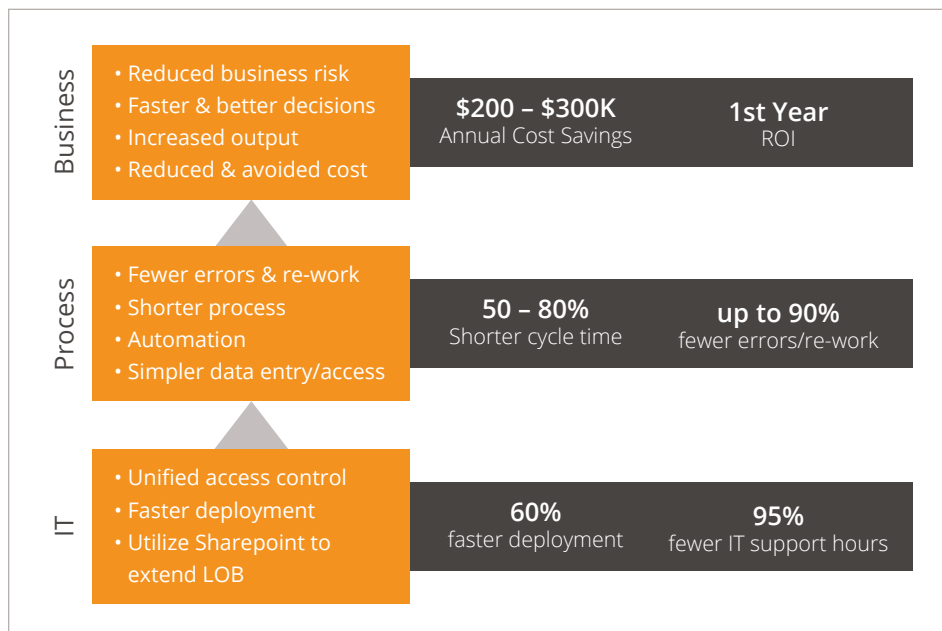
Reason #3: Integrating LOB data in SharePoint Can Achieve Savings of Up to 90%

Traditionally, line of business (LOB) applications served discrete departments or teams within organizations. For example, the accounting application could only be accessed by the accounting department, human resources systems only the HR department, and so on. This led to a “silo effect” – a lack of communication and cross-departmental support resulting from systems working in isolation from each other.

The advent of new technologies means that business intelligence systems are constantly evolving. By exposing LOB data in Microsoft SharePoint and making this crucial business information available across the organization to all relevant stakeholders, productivity and efficiency are improved, and cross-team collaboration and business processes are more effective. Cross-functional data sharing speeds communication and aligns the entire organization to strategic company objectives.

According to the 2013 study “Connected Value: The ROI Benefits of Business-Critical SharePoint” by the independent market researcher Pique Solutions, the use of business-critical SharePoint (BCSP) solutions resulted in “transformational” savings as high as 80 to 90 percent.

With BCSP solutions rather than other IT approaches, companies enjoyed faster deployments with lower risks, lower costs, and simplified ongoing administration and governance



Source: Connected Value: The ROI Benefits of Business-Critical SharePoint, by Pique Solutions

This study offers more evidence of the value of SharePoint; the combination of high return and low investment lead to demonstrably higher ROI.



Why IT Should Take the Lead in Introducing the Benefits of CRM on Top of SharePoint

A CRM is the system used by a LOB, but IT is tasked with providing guidance on technical matters to the business enterprise. The business enterprise understands what it needs, but in the end, IT owns the responsibility of software systems. Therefore, IT has a strong say about the best way to achieve that business goal. Especially in companies that already have SharePoint, IT grasps the technical benefits of SharePoint as a platform.

IT can recognize and articulate when costs are too high or duplicated. An IT manager can define the speed of implementation of a well-designed, flexible, out-of-the-box CRM application versus an in-house CRM development project. Also, an IT manager will steer the business away from risky ventures with vendors that have had many expensive, long and failed implementations, or which may pose a risk in the future.

IT Managers also understand the past investments made in SharePoint, and are in a position to identify the cost savings realized and the value added by extending the use of the SharePoint platform, thus saving time and money on any strategic technology decision. Therefore, IT managers within an organization are in the best position to recognize, communicate, and quantify the tremendous savings and profits that can be realized by harnessing the complementary powers of SharePoint and CRM.



In Conclusion

In this paper we have discussed compelling reasons why investing in a pre-built CRM solutions on top of SharePoint is a sound business strategy with tangible, measurable results. When built on top of SharePoint, a trusted and widely used application with superior built-in functionalities, your CRM delivers an even greater ROI. By combining CRM with SharePoint, you receive the best of both worlds.

About BPA Solutions

As a Business Critical SharePoint Partner, and a worldwide leading editor of SharePoint business solutions, BPA can help companies meet their ROI objectives. BPA Solutions Suite for SharePoint is the most complete suite of business solutions, including CRM, Quality Management, Risk Management, Help Desk, and Recruiting Management.

BPA is the developer of the xRM Platform – the “x” here means any-to-any, so BPA greatly simplifies the establishment and viewing of various SharePoint Lists and data sources.

BPA Builds Closer Relationships



BPA Solutions

Y-PARC – Swiss Technopole
Ave. Découvertes 18, 1400 Yverdon,
Switzerland.
+41-24-524-25-40
info@bpa-solutions.net
BPA-Solutions.net

BPA Solutions (US office)

5 Wirt Street, SW, Suite 203,
Leesburg,
VA 20175, USA.
+1-571-423-6332
sales-na@bpa-solutions.net

BPA Solutions (Asian office)

Technopark, Kerala, India.
+91-994-737-7000
sales-asia@bpa-solutions.net