# APTEAN

**WHERE SOFTWARE WORKS**

# PIVOTAL CRM

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Aptean provides Customer Relationship Management (CRM) and Complaint and Case Management solutions, as well as Enterprise Resource Planning (ERP), Manufacturing Execution Systems (MES), Event Management Framework (EMF) and Supply Chain software spanning industries including Process and Discrete Manufacturing, Food and Beverages, Customer Services, Public Services and Financial Services.

Aptean Pivotal CRM is a full-featured CRM platform built on the Microsoft .NET framework, suited to organizations of all sizes that are looking to take their business to the next level with CRM processes, including sales force, marketing, and service automation. Aptean Pivotal CRM is supported by a full continuum of services that are affordable, easy to use and configurable to any organisation in any industry.

Whether you wish to handle the implementation by yourself, with a partner, or leave it to us, we can accommodate your every need. We can even take on full management and hosting of the application, if you prefer, with the option to bring the solution on-premise when you are ready.

If you are ready to take your organization to the next level, Aptean Pivotal CRM is positioned to get you there by aligning your business processes with the technology needed to optimize your operations so you can set your sights on bigger things. Build, grow and drive your business forward with CRM that maps to your customers' needs.

**About Aptean**: Aptean helps businesses profit, innovate and grow where the work gets done—in the call center, on the floor of the factory, at the end of the assembly line. That's where Aptean's CRM, ERP and Supply Chain software applications enable nearly 5,000 customers to satisfy their customers, operate more efficiently and stay at the forefront of their industry.

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# THE APTEAN PIVOTAL CRM ADVANTAGE

In today's business climate, your CRM needs to work the way you work. It's got to be fast to deploy and easy to use. Flexibility has to be in the box – not bolted on. That keeps your company ahead of its competitors and the sales team in front of your customers. Aptean Pivotal CRM provides insights that can set you apart from the competition while delivering real ROI to the bottom line.

You need facts to choose a proven, best-fit CRM system for your business – based on your business's needs. And best-fit is important as proven by customer loyalty: the average Aptean Pivotal CRM customer has been using the solution for more than eleven years.

## CONFIGURABILITY

Aptean Pivotal CRM's customers can quickly deploy business processes by eliminating the need for a development environment and utilizing a visually connected action based designer. Aptean Pivotal CRM also provides visual workflow, a drag-and-drop, flowchart style designer that lets users create a business process in both the production and customization environment. This saves time and money, and empowers the user to precisely model their own unique processes.

- No coding necessary, configuration can be performed by non-technical staff

- Configuration requires only standard IT skills, not specialized training or armies of outside consultants

- Work within a 'whiteboard' environment

- Directly manage data and automate everyday routines

## CUSTOMIZATION TECHNOLOGY

Flexibility is the cornerstone of the Pivotal CRM advantage. Extreme architectural flexibility cuts down on the time and cost of customizing Pivotal CRM solutions and allows businesses to create the internal processes and external customer experiences that fit their strategy and vision.

## EXCHANGE INTEGRATION

Aptean Pivotal CRM features the most integrated and intuitive MS Office based CRM solution available today. Deep and seamless incorporation of MS Outlook functionality with SharePoint integration provides a familiar user experience. Plus—the Pivotal platform is based on Microsoft.NET technology that provides task based navigation, easy customization, and a smart client user interface, resulting in high user adoption and a low total cost of ownership.

## DASHBOARDS

One of the many reasons Pivotal enterprise dashboards stand out in the market is because they're built around a real-world workflow and have a role-based approach, empowering you to build state-of-the-art dashboards.

- Extensive interactivity

- Drill-down and hover-overs

- Quick and easy configuration

## MOBILE CONNECTIVITY

Aptean Pivotal mobile CRM solutions keep you connected to critical data, wherever you are. By making CRM available via mobile platforms, you can turn down time into productive time.
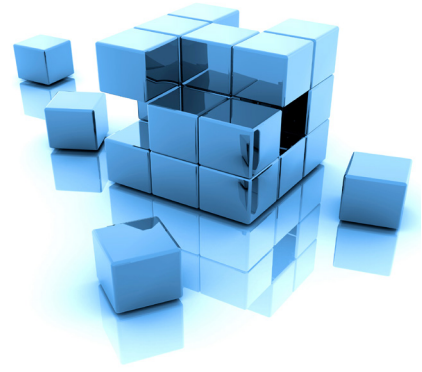
# PIVOTAL CRM:
# INDIVIDUAL CUSTOMIZATION

To offer a unique customer experience, you need an integrated solution that spans all of your customer facing processes and beyond.

Aptean Pivotal CRM offers a flexible application development platform on which several modules can be built to enhance your unique processes, including sales, marketing, social media, service or any and all of the above.

## SALES FORCE AUTOMATION

Aptean Pivotal CRM Sales lets sales teams call the shots when it comes to their sales tool. It supports salespeople with all of the tools they need to sell—Outlook email, SharePoint, lead and opportunity management, mobile access and actionable social network information—in a solution they can quickly and easily configure without the help of the IT department. Sales teams can collaborate to work their magic, close more business and satisfy customers.

Contact Management: Build a knowledgeable, 360-degree view of your customer, capturing preferences and relationship-building information during every interaction, saving time and maximizing your productivity when entering call notes.

Analytics & Forecasting: Take the leg work out of delivering an accurate sales forecast and work smarter with tools for win/loss and discounting analysis. Monitor your pipeline and get advanced notice of successes and challenges so you can take action early.

## MARKETING AUTOMATION

Aptean Pivotal CRM gives marketers the tools they need to generate, qualify, distribute, nurture, and route high-quality leads—all at an ever-increasing pace with fewer resources. 360-degree view of target markets means marketers can profile promising sales leads, segment audiences by relevant common interests and attributes, and proactively launch campaigns that will capture their attention and convert them into sales opportunities.

Marketers need to know their audience, understand what kinds of messages they want to receive and in what format, and easily identify and filter out stale or duplicate contacts or those who wish to unsubscribe. Aptean Pivotal CRM provides the tools to automate this time-consuming task, while also enabling contacts to manage their own profiles, subscriptions, and preferences.

## SERVICE AUTOMATION

Aptean Pivotal Service automates the capture, management, and resolution of customer service and support requests. Pivotal Service gives customer service representatives the tools and information they need to deliver fast, efficient, and personalized service that results in improved customer satisfaction and long-term profitability.

Aptean Pivotal Service enables companies to cost-effectively interact with each customer via their channel of choice.

- Route issues effectively with automatic issue routing by ability or availability
- Cultivate loyal customers by delivering fast, consistent, reliable service
- Accelerate issue resolution with automated workflows to streamline processes
- Increase first-contact resolution with a comprehensive knowledgebase
- Ensure compliance with SLAs through automatic escalation in line with service-level agreements
- Track service efficiency by measuring the time it takes to complete service steps

# PARTNER AUTOMATION

Aptean Pivotal ePartner, in combination with Aptean Pivotal Partner Manager, delivers a self-service, web-based application that simplifies the recruiting, managing, and enablement of partners, while allowing companies to evaluate partner performance based on expertise and revenues.

By extending collaborative sales, marketing and service capabilities to your best partners, routing best leads to the most qualified partners, and improving partner loyalty by rewarding performance, Pivotal ePartner allows companies to recruit and retain better partners for less.

• Sales: Opportunity management and forecasting enables better management planning and decision making for optimization of demand and supply chain operations. Partners enter and update opportunity information directly through Pivotal ePartner. Partners also gain easy access to a complete set of sales tools including collateral, quoting, and literature fulfillment systems.

• Marketing: Improve marketing ROI and product development effectiveness through collaboration on marketing projects and up-to-date market intelligence from partners.

• Service: Ensure fast, consistent, and efficient issue resolution by streamlining partner requests for service while tracking, measuring, and controlling the resolution process.

# SOCIAL CRM

Aptean Pivotal Social CRM brings the power of the social Web into your business where it is most relevant and valuable: within your Aptean Pivotal CRM system. An application module built for the Aptean Pivotal CRM 6 and Aptean Pivotal CRM for Financial Services 6 platforms, Pivotal Social CRM integrates the most popular and ubiquitous social media tools including Facebook, LinkedIn and Twitter, with your users' daily activity hub, Pivotal CRM. Not only does it enable you to bring the deep insight and business intelligence derived from those social media sites into your customer and prospect database, but it is designed to incorporate social media elements into the natural daily workflows of your sales, marketing, and service teams.

Key Features:

- Social Media Integration
- CRM Actions
- Account Linking
- Activity Viewing
- Aggregate Views
- Social Media Monitoring
- InsideView Integration
- Google BlogSearch Integration
- Social Media Communication
- Facebook Event Management
- Social Media Activity Tracking
- Relationship Tracking

# MOBILE CRM

Aptean Pivotal CRM for iPad is an App that allows users to interact with Pivotal CRM from an iPad, accessing CRM information when and where they need it. Specifically designed for the iPad, this App utilizes the entire screen for a great looking, native user experience. Plus, Pivotal lets you simply tailor your iPad display so it is just how you like it.

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# CASE STUDY:

# STATE BANK OF INDIA UK

## IMPROVED TURN-AROUND TIMES FOR SERVICES ACROSS THE BUSINESS

**CLIENT:** State Bank of India UK
**INDUSTRY:** Financial Services
**SOLUTION:** Pivotal CRM

### CHALLENGES:

- SBI UK's quickly growing presence in the UK market required an efficient system which would provide first class customer service in each new branch

### BENEFITS:

- Flexible dashboard for management and controllers

- Integrated with central banking system allowing whole of life customer reporting and better care

**State Bank of India (SBI), with a 200 year history, is the largest commercial bank in India in terms of assets, deposits, profits, branches, customers and employees. The group has an extensive network, with over 20,000 plus branches in India and another 173 offices in 34 countries across the world. SBI has had a presence in the UK for almost 100 years and has recently entered into retail banking.**

State Bank of India (SBI) first opened its doors to the UK market on 27th January, 1921 and has been growing ever since. To keep up with its rising customer base at its ten branches in some of the largest cities in the UK, including London, Birmingham and Manchester, SBI decided to invest in a system to manage their customer communications.

Aptean's solution, Pivotal CRM, stood out after State Bank of India UK (SBI UK) received positive feedback about the system from another regional operation of the bank, where Aptean had worked on a CRM project. As all businesses have unique needs to meet, flexibility was a key factor for the new system. Aptean Pivotal CRM was tailored to fit the demands of SBI UK straight out of the box. The option to customize data and workflow offered a high degree of control which was essential for streamlining services within this customer facing bank.

Based on experience in the finance sector and an in depth understanding of customer facing industries, Aptean was able to help SBI UK improve their number one priority: customer service. The ability of Aptean Pivotal CRM to consolidate information relating to individual customer's cases was essential in offering a

rapid and effective service, which leads to an increase in retention rates. It was clear from the initial discussions that SBI UK wanted to implement the CRM solution in a short time frame. Aptean's senior management team worked with SBI UK in partnership to ensure a smooth project implementation. This involved ongoing discussions, support and guidance with SBI UK feeding back to Aptean throughout. The team demonstrated to SBI UK that each and every customer is important to Aptean.

## THE PROJECT

The implementation of Aptean Pivotal CRM began on 31st January, 2013 with a target go-live date of the 31st March. Aptean Pivotal CRM was up and running on SBI UK's systems in their headquarters and all branches by 11th March, 2013. Phase one of the project lasted 52 days and encompassed marketing and sales, operations and branches, the contact centre and compliance. A better flow of customer queries and improved customer handling were implemented, as well as leads management within marketing and better analysis in compliance.

The deployment of Aptean Pivotal CRM was done without the use of a domain so that the system would integrate with the hosting server's own local security policy. No active directory or single-sign on was implemented; Aptean introduced their own password history and enforcement routines within Pivotal CRM. The tight turn-around when implementing Aptean Pivotal CRM was achieved with focused goals and clear responsibility at each level, with the overall project management kept simple which helped with acceptance within the company. Good communication is essential in a project like this. The relationship between SBI UK and Aptean was smooth and open from the start. The most important needs of SBI UK were met first in the form of training in small groups, allowing for a smooth implementation for approximately 30 users.

SBI UK also plan to use Aptean Pivotal CRM's ability to track more complex services by using service step functionality which has been customized in line with the service tickets.

This allows turn-around times, query types and service team allocation to be set at ticket and step level. The clever use of combining ticket categories, service levels and service teams means that tickets and steps are automatically allocated turn-around times and service teams based on the ticket type. This makes for a simple yet effective solution to providing services and resolving customer queries across the organization in a single process.

The implementation was carried out in a non-standard environment without dependence on Microsoft Exchange, but with Lotus Domino as the back-end mail server. Aptean also introduced the functionality of Microsoft Outlook as the linked mailclient. Outlook is currently in use by employees as their email and calendar client, so this made for a smoother integration and user adoption.

## BUSINESS BENEFITS

SBI UK received very positive feedback from their users due to Aptean Pivotal CRM's flexible dashboard for management and controllers. This helped with integrating Aptean Pivotal CRM into their activities. A noticeable decrease in turn-around times has also been seen across all sections of the business by having a complete view of all customer interactions in one centralized location.

With Aptean Pivotal CRM, SBI UK has experienced immediate results. A more streamlined system has introduced both past and current customer data to the fingertips of the service providers, allowing for an effective customer and feedback management process. By customizing existing out of the box functionality, SBI UK have been provided with a flexible yet tailor made system which perfectly delivers their requirements without the loss of any standard functionality.

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# CASE STUDY:

# SYNGENTA

**ACTUAL CUSTOMER INTELLIGENCE ENABLED A FOUR TIME RETURN ON CAMPAIGN INVESTMENT WITH PIVOTAL 6.0**

**CLIENT:** Syngenta
**INDUSTRY:** Bio-Science
**SOLUTION:** Pivotal CRM

## CHALLENGES:

- To maximise the return on marketing and sales investments by better understanding the product end-user

## BENEFITS:

- Analytical breakdown of purchasing profiles and trend mapping has opened up revenue and co-operative marketing opportunities with sales

- 360-degree view of promotion reactions against demand vs. supply fluctuations shows campaign effectiveness

**Syngenta is one of the world's leading providers of field crops, vegetables and flower seeds, seed care products, herbicides, insecticides and fungicides for crop protection, and turf, garden, home care and public health products. The majority of its products are sold to farmers and growers via wholesale and retail specialists.**

Syngenta is committed to supporting sustainable agriculture through innovative research and technology. It provides the crucial link between crop success and failure for farmers and plant growers. It is vital that Syngenta understands the needs of each customer, both the business and the environmental factors that impact crop success.

## PRIOR ENGAGEMENT

After evaluating a number of options, Syngenta implemented Aptean Pivotal CRM, largely because of its ability to streamline customer records and build a complex database of end-user product usage. Prior to Aptean Pivotal CRM, the Syngenta field sales teams used a disparate mix of pen and paper; spreadsheets and basic database customer records. There was little process cohesion and records had to be shared manually and updated individually, all the time consuming processes and leaving very little scope for customer analytics.

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## WHAT CHANGED?

In 1999, this changed with the initial Pivotal installation. A significant upgrade in 2004 completely revolutionized the way that Syngenta interfaced with its customers and there was an immediate parallel increase in revenue and customer satisfaction. Syngenta needed a CRM tool that could support its end to end sale process; a platform that could combine traditional customer contact tools with an extremely sophisticated, data heavy customer rewards program, potentially holding the details of the UK's 24,000 targets, plus those of industry advisory and influencer groups.

The storage requirement, and that of the analytics, meant realistically only a bespoke CRM platform could support Syngenta's business needs, but a bespoke solution was beyond the budget.

Aptean Pivotal CRM bridged both by combining the price point of an off-the-shelf solution with the ability for the CRM team to easily customize fields to ensure absolute compatibility with the businesses requirements, not only now, but into the future.

In 2010, after 12 years of total CRM support from Aptean, Syngenta reviewed the market options and established that no other commercial CRM solution could match the pin-point customer intelligence generated by Aptean Pivotal CRM, nor had the feature flexibility that enabled Syngenta to customize and add the functionality it needed to meet its specific business needs.

As a result, the option was taken to upgrade to Aptean Pivotal CRM 6.0, with its Microsoft Outlook and Blackberry integration. The system was set up in parallel to Aptean Pivotal CRM 5.9 to ensure a smooth transition. Syngenta had seen a four-fold return on marketing and sales investment since using Aptean Pivotal CRM as the lynch-pin to its marketing programs. Syngenta are also seeing significant turnover increases from existing product lines, plus the opportunity for new promotions and revenue streams as the result of further refining customer responsiveness by integrating with MS Outlook.

## FULLY SUPPORTED CUSTOMER RELATIONSHIP MANAGEMENT

Syngenta is committed to supporting sustainable agriculture through innovative research and technology. It provides the crucial link between crop success and failure for farmers and plant growers. It is vital that Syngenta understands the needs of each customer, both the business and the environmental factors that impact crop success.

End-user intelligence holds the key to Syngenta's success. The only way to achieve this is to understand firstly who the end customers are and then establish their growing profiles and methods of plant husbandry and crop protection. With this intelligence it is then possible to market effectively to them, targeting them with promotions or advice on how to combine products for better results, for example.

## CONTINUED SUPPORT

Aptean Pivotal CRM is also used by Syngenta's sales teams in France, Australia, USA, Canada, Mexico and some additional South American countries. Over the last 12 years, Aptean, Syngenta UK and the regional Syngenta offices have established an extremely solid and collaborative working relationship.

Formal project management methodology was followed throughout the course of the recent upgrade project. The Aptean project team provided clearly defined processes and controls. Aptean ensured that adequate quality assurance measures were in place from planning, through the solution and user acceptance testing phases, to the point of go-live and throughout the settling in period. Syngenta continues to be supported by the Aptean issues management team and ongoing Aptean technical resources.

# WHITEPAPER:

# A DAY IN THE LIFE OF A CONTACT CENTER AGENT

**There are many aspects to being a successful and competitive business in today's modern arena that will vary depending on your geographic location, your market conditions and your industry sector to name but a few. There are no sets of 'golden rules' or 'silver bullets' that will ensure your business is the most successful, there are just too many variables, however there are some extremely common themes that all companies can follow to maximise their potential.**

A modern proactive organization should be focused on the customer experience, regardless of whether there is an end customer or another commercial organization in this role. This is critical in this day and age as we the consumers expect more and expect it instantly, we live in a world where immediacy is paramount.

Put simply, we expect all the businesses that we interact with to be as up to speed as we are. This is how we run our lives. Today's business environment is fast paced and will only become increasingly more so. This presents numerous challenges to the business:

- What is it we actually want to achieve?

- How do we interact with the customer?

- Where are the touch points?

- Do we encourage the customer to reach out to us or are we putting up barriers?

- What systems do we need in place to manage this and how will they interact with one another?

- How are we going to measure our customer experience success?

Most large scale organizations will have a contact center through which they can 'touch' the customer first hand. It does not matter who the end customer is per se, but that the organization has mechanisms in place to service and satisfy their client base.

A contact center is very different to a traditional call center, as it is a blended environment of multiple interaction types and not just the telephone system. A true contact center incorporates inbound and outbound, phone, fax, mail, email, SMS, web, chat, social and more. If there is one place in your business where the employee should have the 360 degree view of the client in order to service them most effectively, this is where it is.

Contact centers are an extremely dynamic part of the business, and not to be deemed an afterthought or less important than high profile areas such as Sales. There are key challenges that all businesses will face that are typical of how a contact center operates.

## High agent turnover

Typically the contact center agent is a lower pay scale employee, perhaps on a temporary basis or via an agency to fulfil seasonal demand. They tend to be young and inexperienced in life, commercial awareness and customer service and do not see the role as a career but as a transitional job. If they are not fully engaged in the role there is likely to be absenteeism, attrition and poor performance. This in turn leads to a huge economic headache for the business in terms of staff training time and cost, therefore efficiencies of scale and automation can help here.

**Environment**

How does the business enhance and engage the role by providing a comfortable, calm and professional environment for the agents? Even the best contact center can seem like chaos at times, so managing the working environment and the way agents are motivated can pay dividends. This can include seating, desks, cubicles, areas for downtime, real time reporting and feedback and how they are monitored by Supervisors. A happy worker is an efficient worker (and less likely to be absent or leave).

**Operational Systems**

Efficient systems in place will make your agent's day to day role simpler and faster, and you will reap those rewards in KPI's such as your AHT figures (average handling time), abandon rate, longest delay in queue, blockage rates and ultimately the customer retention and satisfaction levels. They will also help the agent understand where a customer came from, their history, and customer facing activities within the rest of the business (such as marketing) and important service & support based information.

Implementing the right systems in a joined up manner to deliver what each role requires is quite a task, but ultimately can then increase the desirability of the contact center as an employer. A job interview is a two way process after all. Agent attrition can often be due to poor internal systems, particularly once they have experienced better systems in other businesses.

If the contact center becomes well known for its working environment as a whole and agents want to come and work there, it can lower costs for the business and enhance customer retention and satisfaction, in short, it is a win-win situation. With the right systems in place not only will it enhance the agent's role but will then naturally lead to better quality real time reporting for the Supervisors and business at large.

## THE STRATEGY

Without an effective contact center strategy in place, businesses are missing out on significant competitive advantages. The demand is clear: customers expect companies to deliver fast, seamless interaction across all communication channels.

To compete with organizations that offer sophisticated multichannel service strategies, your business requires a contact center strategy of its own. But, how can you develop a solid strategy that is both cost-effective and precisely tailored to your needs—and those of your customers?

With the right contact center strategy and application, businesses can improve the top and bottom line and can also:

- Deliver a positive service and brand experience to customers

- Create proactive interactions with customers

- Reduce costs without sacrificing the quality of service

- Increase revenue with every customer interaction

- Improve key performance indicators

- Outperform larger competitors

- Outmanoeuvre competitors quickly to take market share

## JOINING THE DOTS....

With the correct strategy in place plus the right systems, the business can implement an efficient and effective contact center environment that enables the agents to fulfil their role to the best of their ability, provide a professional and competitive workplace, increase customer retention and satisfaction whilst also raising the bottom line and reducing costs.

CRM is a highly effective way to demonstrate to customers that every business unit across the organization, including sales, marketing, support and service, is connected and interdependent. CRM gives agents the knowledge they need to make changes to the way they treat customers inside of the contact center based on other activities within the organization.

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