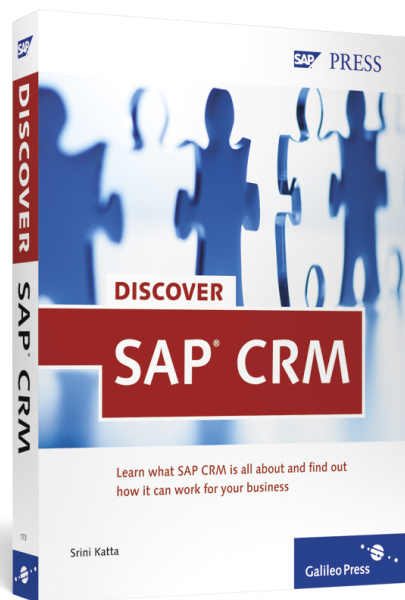


Srini Katta

## Discover SAP® CRM



# Contents at a Glance

1	Customer Relationship Management .....	27
2	SAP CRM Detailed Overview .....	43
3	SAP CRM Marketing .....	61
4	SAP CRM Sales .....	79
5	SAP CRM Service .....	99
6	SAP CRM Interaction Center .....	123
7	Web Channel Enablement Solution .....	153
8	SAP CRM Mobile Applications .....	177
9	SAP CRM Partner Channel Management .....	199
10	The Technology and Tools Behind SAP CRM .....	229
11	Master Data .....	253
12	Working with SAP Industry Vertical Solutions .....	279
13	SAP CRM Analytics .....	305
14	SAP CRM User Access .....	343
15	Building an SAP CRM System .....	355
16	Varian Medical Systems Case Study .....	371
A	Glossary .....	375

# Contents

Acknowledgments .....	19
Preface .....	21
Whom This Book Is For? .....	21
What You'll Discover .....	22
Navigational Tools in This Book .....	22
What's in This Book? .....	23

## **1 Customer Relationship Management ..... 27**

What Are Your Industry Verticals? .....	28
What Type of Business Are You In? .....	28
Who Are Your Customers? .....	29
What Are Your Products and Services? .....	29
Which Channels Does Your Company Use? .....	31
What Are Your CRM Business Needs? .....	31
What Is Your Company Culture? .....	33
How Big Is Your Company? .....	34
Are You Global, Regional, or Local? .....	34
Competitiveness of Your IT Infrastructure and Architecture .....	35
Core CRM Principles .....	36
Customer First .....	36
Designing a Customer- First CRM Initiative .....	37
Customized Product and Service Offerings for Customers .....	39
Increase Customer Lifetime Value .....	39
What Functionality Should Your CRM Application Provide? .....	40
What Drives CRM Technology? .....	41
Conclusion .....	41

## **2 SAP CRM Detailed Overview ..... 43**

What Is SAP CRM? .....	43
SAP CRM Strengths .....	44

The Three Key Components of SAP CRM .....	45
SAP CRM Solution Map .....	47
SAP CRM Marketing .....	48
SAP CRM Sales .....	49
E-Commerce (Formerly Internet Sales) .....	50
SAP CRM Service .....	51
Analytics .....	53
How Can SAP CRM Analytics Help Your Company? .....	55
SAP CRM Solutions for Small- and Medium-Size Businesses .....	55
SAP CRM On-Demand Solutions .....	58
Benefits of SAP CRM On-Demand for SMBs .....	58
Conclusion .....	58

**3 SAP CRM Marketing ..... 61**

SAP CRM Marketing Component .....	63
Marketing Resource Management (MRM) .....	64
Market Planning and Budgeting .....	65
Segmentation .....	67
List Management .....	68
Campaign Management .....	70
Trade Promotion Management (TPM) .....	71
Lead Management .....	73
Backend ERP Integration .....	75
Marketing Analytics .....	75
Case Study .....	77
Conclusion .....	78

**4 SAP CRM Sales ..... 79**

Discover SAP CRM Sales .....	80
Accounts and Contact Management .....	81
Activity Management .....	84
Planning and Forecasting .....	84
Territory Management .....	85
Opportunity Management .....	86

Product Configuration and Pricing .....	87
Quotation and Order Management .....	89
Billing and Contract Management .....	91
Incentives and Commissions Management .....	93
Time and Travel Management .....	93
Sales Analytics .....	94
Case Study .....	96
Conclusion .....	98

## **5 SAP CRM Service ..... 99**

Discover SAP CRM Service .....	100
Installed Base Management .....	101
Warranty Management .....	103
Contract and Entitlement Management .....	105
Resource Planning .....	107
Knowledge Management .....	108
Case Management .....	110
Service Order and Service Ticket .....	111
Complaints and Returns .....	114
In-House Repair .....	115
Service Analytics .....	117
Business Drivers .....	118
Case Study .....	119
Conclusion .....	121

## **6 SAP CRM Interaction Center ..... 123**

Interaction Center Strategy .....	125
Consolidating Standalone Telephone, Email, and Chat Applications .....	127
Customer-Facing Tools and Interfaces .....	132
Telephone and Interactive Voice Response .....	133
SAP CRM Interaction Center Capabilities .....	139
Agent Desktop Productivity Tools .....	139
Multi-Channel Integration .....	140
SAP CRM Marketing Integration .....	141
SAP CRM Sales Integration .....	142

SAP CRM Service Integration .....	143
Blended Business Scenarios .....	145
Shared Service Centers .....	147
Running Your Interaction Center: Operations and Administration .....	148
Case Study .....	148
Conclusion .....	150

## **7 Web Channel Enablement Solution ..... 153**

E-Marketing .....	156
Demand Generation .....	156
Catalog Management .....	157
Personalization .....	158
E-Commerce (Formerly E-Selling) .....	158
Interactive Selling .....	159
Pricing .....	162
Order to Cash .....	163
Web Auctions .....	170
E-Service .....	170
Knowledge Management .....	171
Service Management .....	172
Web Channel Analytics .....	173
Conclusion .....	174

## **8 SAP CRM Mobile Applications ..... 177**

Introduction to SAP CRM Mobile Technology .....	179
SAP CRM Mobile Sales .....	182
Mobile Sales Laptop .....	183
Mobile Sales Handheld .....	186
Mobile Sales Online .....	189
SAP CRM Mobile Service .....	191
Mobile Service Laptops .....	191
Mobile Service Handheld (for SAP CRM 4.0) .....	193
Case Study .....	194
Conclusion .....	196

## 9 SAP CRM Partner Channel Management ..... 199

Why Use Channel Partners? .....	200
Channel Management and SAP .....	201
Partner Management .....	203
Partner Recruitment .....	203
Partner Profiling and Segmentation .....	205
Partner Training and Certification .....	205
Partner Networking .....	207
Partner Compensation .....	208
Partner Planning and Forecasting .....	208
Channel Marketing .....	208
Partner Communication .....	209
Catalog Management .....	209
Campaign Management .....	209
Lead Management .....	210
Channel Marketing Funds .....	210
Partner Locator .....	211
Channel Sales .....	212
Account and Contact Management .....	213
Activity Management .....	213
Opportunity Management .....	214
Channel Sales Analytics .....	214
Partner Order Management .....	215
Quotation and Order Management .....	215
Interactive Selling and Configuration .....	216
POS and Channel Inventory .....	216
Collaborative Showrooms .....	217
Distributed Order Management .....	218
Channel Service .....	220
Knowledge Management .....	221
Live Support .....	222
Service Order Management .....	222
Complaints and Returns Management .....	223
Partner and Channel Analytics .....	223
Case Study .....	224
Conclusion .....	226

**10 The Technology and Tools Behind SAP CRM ..... 229**

- SAP NetWeaver Introduction ..... 229
  - Enterprise Service-Oriented Architecture (Enterprise SOA) ..... 231
- SAP NetWeaver Integration ..... 232
  - People Integration ..... 233
  - Information Integration ..... 234
  - Process Integration ..... 234
  - Application Platform ..... 235
- SAP NetWeaver for SAP CRM ..... 236
  - SAP NetWeaver Web Services for SAP CRM ..... 236
  - SAP NetWeaver Mobile for SAP CRM ..... 238
  - SAP NetWeaver Process Integration (PI) for SAP CRM ..... 238
  - SAP NetWeaver Java for SAP CRM ..... 240
  - SAP NetWeaver Enterprise Portal for SAP CRM ..... 240
- SAP CRM Technology ..... 242
  - SAP CRM Middleware ..... 242
  - Groupware Integration with SAP CRM ..... 243
  - SAP CRM Mobile ..... 244
  - People-Centric User Interface (PCUI) ..... 245
  - Business Server Pages (BSP) ..... 246
  - SAP CRM WebClient (New with SAP CRM 2006s and SAP CRM 2007) ..... 247
  - SAP CRM Business Object Layer (BOL)/Generic Interaction Layer (genIL) ..... 247
    - ABAP ..... 248
- Case Study ..... 249
- Conclusion ..... 250

**11 Master Data ..... 253**

- Business Partner (BP) Master Data ..... 255
  - Business Partner Design in SAP CRM ..... 256
  - Business Partner Categories ..... 256
  - Business Partner Roles ..... 257



BP Classification .....	258
BP Relationships .....	260
Product Master Data .....	262
SAP CRM Product Master Data Design .....	262
Product Types .....	263
Product Attributes and Attribute-Set Types .....	264
Product Categories and Hierarchies .....	265
Product Relationships .....	266
Organizational Master Data .....	267
Organizational Objects .....	268
Organizational Attributes and Business Attributes .....	269
Pricing Master Data .....	272
SAP Internet Pricing and Configurator (IPC) .....	272
Condition Technique and Condition Records .....	274
Case Study .....	275
Conclusion .....	277

**12 Working with SAP Industry Vertical Solutions ..... 279**

Automotive .....	280
Chemical Industry .....	281
Consumer Products (CP) .....	283
Engineering, Construction, and Operations .....	285
High Tech .....	286
Oil and Gas .....	287
Life Sciences (Pharmaceutical) .....	287
Financial Services (Banking and Insurance) .....	289
Leasing .....	291
Media .....	293
Professional Services .....	294
Public Sector .....	297
Retail .....	298
Telecommunications .....	299
Utilities .....	300
Case Study .....	303
Conclusion .....	303

**13 SAP CRM Analytics ..... 305**

- SAP CRM Analytics ..... 306
- Marketing Analytics ..... 311
  - Market Budget Planning ..... 312
  - Campaign Planning ..... 312
  - Target Group Optimization ..... 313
  - Market Plan Analysis ..... 314
  - Campaign Monitoring and Success ..... 314
  - Lead Analysis ..... 315
  - External List Analysis ..... 316
  - External List Cost and Revenue Analysis ..... 318
- Sales Analytics ..... 320
  - Territory Management Analysis ..... 321
  - Activity Management Analysis ..... 321
  - Opportunity Management Analysis ..... 321
  - Sales Quotation and Order Management Analysis ..... 322
  - Contract Management Analysis ..... 323
  - Sales Pipeline Analysis ..... 324
  - Sales Funnel Analysis ..... 324
  - Sales Performance Analysis ..... 325
  - Billing Analysis ..... 326
- Service Analytics ..... 327
  - Service Quality Analysis ..... 328
- Customer Analytics ..... 334
  - Customer Migration Analysis ..... 334
  - Churn Management ..... 335
  - Customer Lifetime Value (CLTV) ..... 336
  - Customer Satisfaction and Loyalty Analysis ..... 337
- Product Analytics ..... 337
  - Cross-Selling Proposals ..... 338
  - Product Profitability Analysis ..... 338
- Interaction Channel Analytics ..... 339
  - Web Channel Analytics ..... 340
  - Interaction Center Analytics ..... 340
- Conclusion ..... 341

**14 SAP CRM User Access ..... 343**

User Access Modes .....	344
Desktop/Laptop .....	344
Notebook Computers .....	345
PDA Companion .....	345
Tablet PC .....	346
Handheld Devices .....	347
Smartphone .....	348
SAP CRM Enhanced Usability .....	349
Design Layer Customizing .....	351
Conclusion .....	352

**15 Building an SAP CRM System ..... 355**

Discover Your Business Needs .....	356
Set Up a Team and/or Hire an SAP CRM Business Application Consultant .....	356
Conduct Discovery Sessions .....	356
Business Scenario Analysis .....	357
Design and Development .....	358
Functional Design .....	358
Technical Design .....	359
Implementation/Configuration/Development .....	359
End-to-End Deployment .....	359
Project Methodologies .....	360
ASAP Methodology .....	360
Cycle Methodology .....	366
Conference Room Pilot (CRP) Methodology .....	367
Conclusion .....	368

**16 Varian Medical Systems Case Study ..... 371**

Business Challenge .....	371
Business Objectives .....	372
Technology Challenge .....	374
Solution Deployment .....	376

Value Achieved ..... 377

Lessons Learned ..... 378

    Have a Focused Approach and Implement SAP  
    CRM in Small Pieces ..... 378

    Get Key Users Involved Very Early, Preferably During  
    Sandbox Testing ..... 379

    Establish Direct Communication with SAP Product  
    Developers — Especially in a Ramp-Up Scenario ..... 379

    Pilot with a Smaller Group If Possible to  
    Mitigate Risks ..... 379

    Get the Right People on the Bus ..... 380

Relieve the Core Team of Users from Their Daily  
Jobs So They Can Dedicate Their Time to the Project ..... 381

Have Dedicated Project Managers from the Business  
and IT Teams ..... 382

Use SAP Best Practices for SAP CRM ..... 382

Looking Ahead ..... 383

**A Glossary ..... 385**

Index ..... 399

## SAP CRM Marketing

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.

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 small- and medium-business (SMB) market.

### Marketing strategy versus marketing plan

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, namely campaigns and trade promotions:

- › A *campaign* contains information such as the campaign objectives, tactics, priority, channel (email, 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 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.

However, a disproportionate amount of marketing budgets are still focused on efforts to acquire new customers rather than efforts to retain profitable existing customers. But this can be a real mistake! Many experts recommended that companies focus most of their mar-

keting 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.

SAP Real-Time Offer Management

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 Component

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.



Figure 3.1 SAP CRM Marketing Solution Map

### 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 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 budget. Marketing managers, in addition, also need flexibility to respond to changing dynamics. Most marketers would agree that marketing is probably more of a skill – or even an art – than an exact science.

MRM manages resources for running successful marketing campaigns

MRM manages all of 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 (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.

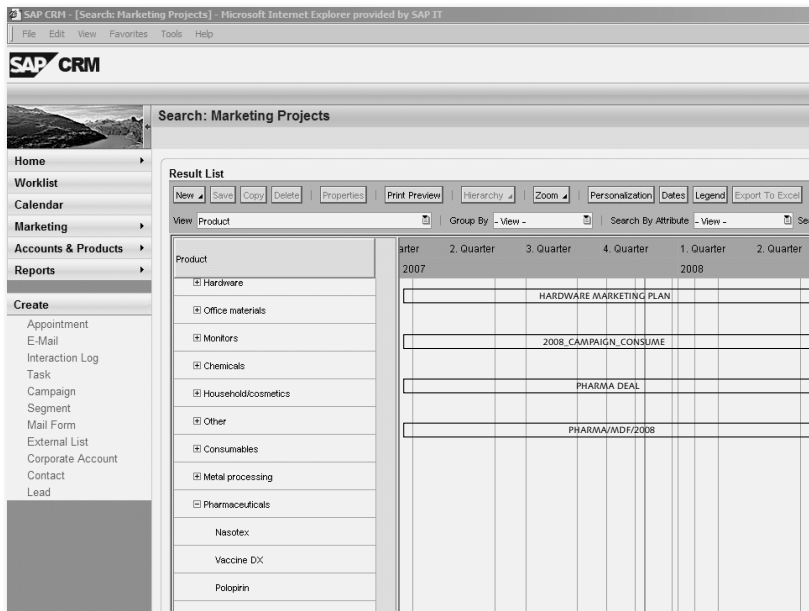


Figure 3.2 Marketing Calendar Functionality in SAP CRM

## 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 BI helps analyze past market 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 to 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 the SAP ERP Project Systems component (Figure 3.3).

The screenshot displays the 'Marketing Plan Details' window in SAP CRM. The window title is 'Marketing Plan Details' with an 'Edit' button. The main content is organized into several sections:

- General Data:** ID: M-00010218, Description: Global Marketing Plan 2008, Language: English, Type: Planning, Priority: High, Employee Responsible: Sandra Bicker, Marketing Organization: PC4U Marketing (US), Currency: USD, Parent: C:0000-DFP-GHH, Authorization Group.
- Dates:** Planned Start: 01/31/2008, Planned End: 01/30/2009.
- Status:** Current Status: Created, in planning, New Status.
- Notes:** A table with columns 'Text Type' and 'Text'. One entry has 'Text Type' as 'Description' and 'Text' as 'This is a strategic core marketing plan'.
- Segments:** A table with columns 'Segment' and 'Description'. One entry has 'Segment' as 'Target Group' and 'Description' as 'Astoria prospects'.
- Parties Involved:** A table with columns 'Partner Function', 'ID', 'Name', and 'Ac'. One entry has 'Partner Function' as 'Marketing Manager', 'ID' as '415651', and 'Name' as 'Sandra Bicker'.
- Administration Data:**
  - General Data:** Created By: Sandra Bicker (BICKER), Created On: 01/18/2008, Changed By: Dave Lawlor (SRKATTA).
  - Integration:** Created in BI (checked), Available in BI (checked), Created in ERP (unchecked).

Figure 3.3 Marketing Planning Application in SAP CRM

### MRM versus marketing automation

#### Tip

Marketing Resource Management (MRM) is sometimes confused with another marketing concept called marketing automation. However, the two are quite distinct. *Marketing automation* is, as its name suggests, primarily concerned with automating processes such as customer segmentation and customer list creation. Often marketing automation is associated with direct marketing and telemarketing. MRM on the other hand is a much more broad and comprehensive approach that gives marketing managers all of the tools they need 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.

Customer segments

### Ex Example

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 BI, 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 business partner search using the SAP NetWeaver TREX search engine. 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. Spend a couple of minutes on Figure 3.4, so that you can understand the Segment Builder application.

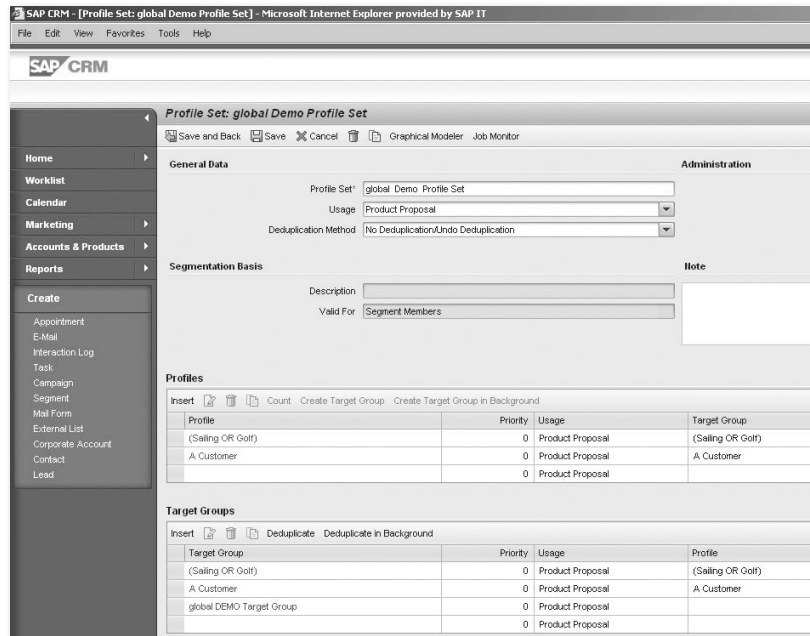


Figure 3.4 Marketing Segment Builder in SAP CRM

## List Management

### List management

Often, companies buy or rent lead lists from list-management companies (e.g., Hoovers, Dun & Bradstreet, etc.) 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 check (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). And, of course, list data can be exported to SAP NetWeaver BI and merged with other business data (such as sales data) to track the success of each list.

## Ex 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 BI integration, the company confirmed that the lists were not resulting in nearly any sales. Rather, almost all of the company's sales were coming from customers who had contacted the company via the Web on the company's website. So, of course, they 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.

The figure consists of two screenshots from the SAP CRM interface. The top screenshot shows the 'Field Mapping between External System and SAP CRM' configuration screen. It displays a table mapping external fields to SAP CRM target fields.

Position	Target Field	Target Field ID	Mapping Rule
1	Name 1	ORG_NAME1	
2	House Number	ORG_HOUSE_NO	
3	Street	ORG_STREET	
4	City	ORG_CITY	
5	Region	ORG_REGION	
6	Postal Code	ORG_POSTL_CODE	
7	ZIP Code	ORG_COUNTRYCD	
8	Title	PERG_TITLE_DEV	Values
9	First Name	PERG_FIRSTNAME	Values
10	Last Name	PERG_LASTNAME	Values
11	E-Mail Address	PERG_E_MAIL	Values
12	Telephone	PERG_TELEPHONE	Values
13	Transaction Type	PROCESS_TYPE	Values
14	Transaction Descr.	DESCRIPTION	Values
15	Priority	LEAD_PRIORITY	Values
16	Classification	MANUAL_QUAL_DEV	Values
17	Origin	ORIGIN	Values
18	Campaign element	CAMPAIGN_ELEMENT	Values

The bottom screenshot shows the 'Load External Lead List' screen. It includes fields for 'Import Date' (set to 01.04.2008), 'Import Time' (set to 12:00:00), and 'Imported From' (set to 1000000000). There are also checkboxes for 'Add Duplicate to Target Object' and 'Add Duplicate to Target Object'. The 'Import' button is highlighted.

Figure 3.5 External Lead List Mapping in SAP CRM Using ELM

Campaign management – tools for running a campaign from start to finish

## Campaign Management

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 SAP campaign automation tools, you can graphically model a campaign and conduct 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 3.6).

### **Ex** 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 for the next two days. The email could also contain a promotion code in case the customer would prefer to call the interaction center and have an agent assist them with placing the order rather than using the Internet. 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 though 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.

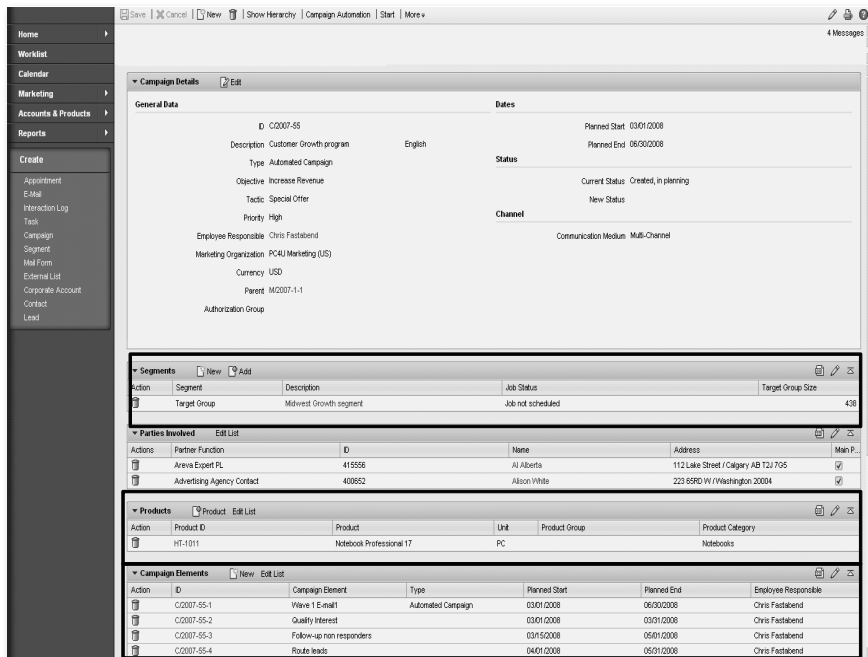


Figure 3.6 The Campaign Management Application in SAP CRM

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 from 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 Management (TPM) increases retail promotion effectiveness

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 and apparel as well as consumer electronics. Many recent studies are raising questions about the effectiveness of trade promo-

tions, 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 may go directly to the retailer's bottom line, rather than being passed on 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 Supply Chain Management (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 3.7).

### Ex 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.

The screenshot displays the SAP CRM Trade Promotion Tool (TPM) interface. The main window is titled "Trade Promotion: C 2007-HTS-TM-2, 2nd HT-1000 Promotion Program". The interface is divided into several sections:

- Trade Promotion Details:** This section contains various data points:
  - General Data:** Trade Promotion ID (C0007-HTS-TM-2), Trade Promotion (2nd HT-1000 Promotion Program), Account Type (Account), Planning Account (PESMA-Denver), Type (Price Promotion), Objective (Increase Revenue), and Tactic.
  - Additional Data:** Funds Plan ID (9000000094), Funds Plan Description (TM-Funds Plan 2007), Agreement ID, Agreement Description, Validation Profile ID (VS\_PROFILE\_TM\_SINGLE), Currency (USD), Priority (Medium), Parent, Exclusion (checked), Indirect Indicator (checked), and Qualifier Check (OK).
  - Organization:** Sales Organization (PCRU US (SORG 302)), Distribution Channel (Internet Sales), and Division.
  - Status:** Current Status (Released, Approved, Object Moving Locked) and New Status.
- Dates:** A section for defining the promotion's time frame.
- Products:** A table listing the products included in the promotion.
 

Address	Product ID	Product	Unit	Product Category ID	Product Category	Exclude	Effective From	Effective To
	HT-1000	Notebook Basic 15	PC	00170201000000110	Notebooks	<input type="checkbox"/>		
- Discounts:** A table listing the discounts associated with the promotion.
 

Actions	Status	Scale	Condition Type	Sales Organization	Sale-To Party	Distribution Channel	Product ID	Amount
				PCRU US	300017	30	HT-1000	300,000.00
				PCRU US	300017		HT-1000	
- General Product:** A section for defining the product details, including Product ID, Description, Product Category, Store Segment, and various flags.

Figure 3.7 Setup Trade Promotions Using the SAP CRM TPM Tool

## Lead Management

So far, we've discussed marketing planning, budgeting, customer segmentation, list management, campaign management, and trade pro-

Manage leads across all marketing channels

motion 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 3.8, leads created in SAP CRM will have the following main fields:

- › Main Partners
- › Qualification Level
- › Lead Group
- › Lead Priority
- › Lead Origin

The screenshot displays the SAP CRM Lead Management interface. The main window title is 'Channel Lead: 211, Media Store Lead, Media Store'. The interface is divided into several sections:

- Navigation Sidebar:** Includes Home, Worklist, Calendar, Marketing, Accounts & Products, Reports, and Create (Appointment, E-Mail, Interaction Log, Task, Campaign, Segment, Mail Form, External List, Corporate Account, Contact, Lead).
- Lead Details Tab:**
  - General Data:** Type: Channel Lead, ID: 211, Description: Media Store Lead, Prospect: Media Store, Prospect Address: 489 N Lincoln Ave / ANTOOHL 8002.
  - Dates:** Start Date: 01.09.2008, End Date: (empty).
  - Status:** Status: Distributed to Channel Partner, Reason: (empty), Since: 02.05.2008.
  - Classification:** Priority: Important, Origin: Trade fair, Group: New Customers.
  - Qualification:** Qualification Level: Cost, Questionnaire Level: Cost.
  - Notes:** (Empty text area)
- Assessments Tab:**

Actions	ID	Description	Version
	LEAD-QUESTIONNAIRE*	Testing	000000001 01.09.2008 03:21:10 LUCKINSE
- Partners Involved Tab:**

Actions	Partner Function	ID	Name	Address	Main P.
	Sales Representative	BRSHTA	Alan Bright	/	
	Sales Representative	GRAHAM	Donald Graham	/	
	Employee-Responsible	LUCKINSE	Mr. Eric Luckinse	/	
	Contact Person	400012	Mr. John Taylor	489 N Lincoln Ave / ANTOOHL 80002	
	Sales Prospect	3271	Media Store	489 N Lincoln Ave / ANTOOHL 80002	
	Channel Partner	300865	EuroCo	125 Millen Avenue / PALO ALTO CA 94304	

Figure 3.8 Creating Leads Using SAP CRM

**Ex Example**

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 ERP 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 SAP ERP Controlling Profitability Analysis (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 BI, 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 3.9 for full details regarding the analytical capabilities of SAP CRM Marketing.

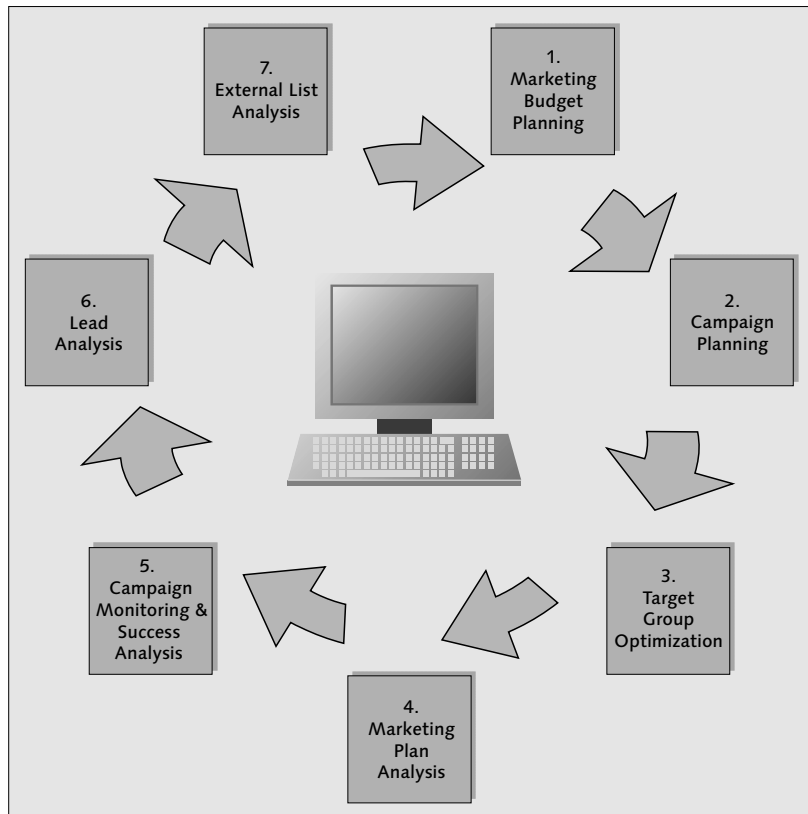


Figure 3.9 Closed-Loop SAP CRM Marketing Analysis Components

## Case Study

The company in this case study is a world leader in digital media creation tools for film, video, audio, animation, games, and broadcast professionals. In fact, this company's technology may be behind a great movie you've watched recently. The company had sales revenues of \$1 billion in 2007.

The business challenges facing this company include a standalone marketing system currently running on Onyx and an apparent disconnect between the marketing and sales departments. Because of this, the success of a marketing campaign was 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.

On the technology side, the company is faced with two challenges: integrating the marketing and sales system, and creating a CRM system that integrates seamlessly with the backend SAP R/3 system.

The solution deployed to meet these challenges initially included an SAP CRM 3.0 system, an SAP R/3 4.6C system, and an SAP BW 3.1 system. The SAP CRM system was later upgraded to SAP CRM 4.0.

The value achieved by deploying this solution included an integrated marketing and sales system where in a prospect is created and upgraded to customer when an order is placed. As a result, the customer data redundancy when a standalone marketing system was used 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 the following:

- › 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 of the tools necessary for marketing managers to successfully execute marketing campaigns.
- › SAP CRM Marketing is fully integrated with SAP ERP and SAP NetWeaver BI.

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

In the next chapter, we'll move on to cover SAP CRM Sales.

# Index

## A

---

- ABAP, 248
  - Advanced Business Application Programming, 248*
- Access sequence, 275
- Account and contact management, 80, 81, 293
- Account management, 185
- Account planning, 185
- Actionable intelligence, 306
- Activity management, 80, 185
- Activity Menu, 188
- Adobe Forms, 236
- Adobe Interactive Form, 237
- Advanced Planner and Optimizer
  - APO, 91*
- Advertising sales management, 293
- Agent desktop productivity tools, 139
- Allgemeiner Berichts Aufbereitungs Prozessor, 248
- Analytical method, 308
  - Measurement, 308*
  - Optimization, 308*
  - Planning, 308*
  - Prediction, 308*
- Analytical scenario
  - Customer, 309*
  - Interaction channel, 309*
  - Marketing, 309*
  - Product, 309*
  - Sales, 309*
  - Service, 309*
- ASAP methodology, 360
- ASAP phase, 362
- Attribute set type, 264
- Available-to-Promise
  - ATP, 91*
- Billing and contract management, 80
- Blended business scenario, 144
- Brand marketing, 284
- Business blueprint, 364
- Business Addins (BADIs), 142
- Business Communications Management (BCM), 129
- Business Object Layer (BOL), 248
- Business package, 241
- Business partner (BP) master data, 255
- Business partner category, 256
  - Groups, 256*
  - Natural persons, 256*
  - Organizations, 256*
- Business partner classification, 258
  - Account group, 258*
  - Competitor, 259*
  - Consumer, 259*
  - Customer, 259*
  - prospect, 259*
- Business partner relationship, 260
- Business partner role, 257
  - Account, 257*
  - Bill-to party, 257*
  - Business Partner (Gen), 257*
  - Consumer, 257*
  - Contact Person, 257*
  - Employee, 257*
  - Payer, 257*
  - Prospect, 257*
  - Ship-to party, 257*
  - Sold-to party, 257*
- Business to Business (B2B), 29
- Business to Consumer (B2C), 29

## C

---

- Calendar and task management, 185
- Call center, 123, 287
- Call Me Back, 133
- Campaign and trade promotion management, 185

- Campaign management, 48, 70, 293
    - Campaign automation*, 209
    - Marketing calendar*, 209
    - Marketing planner*, 209
  - Case management, 110
  - Catalog management, 157
  - Categorization, 284
  - Category performance analysis (CPA), 285
  - Channel commerce, 202
    - Partner order management*, 202
  - Channel intermediary, 201
  - Channel marketing, 202
    - Campaign management*, 209
    - Catalog management*, 209
    - Lead management*, 210
    - Marketing funds*, 210
    - Partner communication*, 209
    - Partner locator*, 211
  - Channel partner management, 49
  - Channel sales, 202
    - Account and contact management*, 213
    - Activity management*, 213
    - Channel sales analytics*, 214
    - Opportunity management*, 214
  - Channel service, 202
    - Complaints and returns management*, 223
    - Knowledge management*, 221
    - Live support*, 222
    - Service order management*, 222
  - Collaborative Project (cProject), 296
  - Commodity chemical, 282
  - Communication Management Software (CMS), 140
  - Complaint management, 185
  - Complaints and returns, 114
    - Quality notification (QM)*, 114
    - Return material authorization (RMA)*, 114
  - Condition record, 273
  - Condition table, 275
  - Condition technique, 273, 274
  - Condition type, 275
  - Consignment process, 283
  - Consumer decision tree (CDT), 285
  - Consumer products
    - Brand management*, 284
    - Category management*, 285
  - Consumer products (CP), 283
  - Contact center, 123
  - Contact center software, 129
  - Contract management, 185
  - Credit card management, 299
  - CRM Marketing
    - Marketing plan*, 62
    - Marketing strategy*, 62
  - CRM middleware, 242
  - CRM Mobile applications, 177
    - Offline mode*, 177
  - CRM sales force automation system
    - SFA*, 93
  - CRM Service, 99
    - Contract and entitlement management*, 105
  - CRM Service order management, 112
  - CRM WebClient, 95, 159, 247, 344
  - CRM WebClient user interface, 247
  - Cross-application analytics, 311
  - CRP methodology, 367
  - Customer analytics, 334
    - Churn management*, 334
    - Customer lifetime value (CLTV)*, 334
    - Customer loyalty*, 334
    - Customer migration*, 334
    - Customer satisfaction and loyalty*, 337
  - Customer fact sheet, 306
  - Customer-first approach, 37, 38
  - Customer Lifetime Value (CLTV), 39
  - Customer service, 293
  - Cycle methodology, 366
- ## D
- 
- Dashboard, 148, 307
  - Delivery-related billing, 92
  - Demand-driven distributed order management, 282
  - Distributed order management, 282
  - Document Management, 283



**E**

E-Commerce, 49, 154  
 EDI transaction document  
   *EDI 940, 166*  
   *EDI 945 shipment confirmation form, 166*  
 Embedded analytics, 306  
 Employee interaction center  
   *EIC, 147*  
 End-to-end deployment, 359  
 Enterprise Java Beans (EJB), 240  
 Enterprise Portal (EP), 240  
 Enterprise services, 47  
 Enterprise SOA  
   *Support from NetWeaver, 231*  
 Entitlement management, 106  
 E-Service  
   *Customer self-service, 171*  
 Exchange Infrastructure (XI), 238  
 External List Management (ELM), 68

**F**

Field sales, 49  
   *Handheld sales, 51*  
   *Mobile sales, 51*  
 Full-cycle solution, 45  
 Functional design, 358

**G**

Grantor Management, 297  
 Groupware integration, 243

**H**

Handheld device, 177  
   *BlackBerry, 178*  
   *PDA, 177*  
   *Smartphone, 177*  
 Home and home office business (HHO), 30

**I**

Implementation method, 355  
 Incentives and commissions management, 81, 93  
 Industry vertical, 28  
 Industry vertical solution, 279  
   *Automotive, 280*  
   *Banking, 280*  
   *Chemical, 280*  
   *Consumer products, 280*  
   *Engineering and construction, 280*  
   *Financial services, 280*  
   *High-tech, 280*  
   *Insurance, 280*  
   *Leasing, 280*  
   *Life sciences, 280*  
   *Media, 280*  
   *Oil and gas, 280*  
   *Pharmaceuticals, 280*  
   *Professional services, 280*  
   *Public sector (government), 280*  
   *Retail, 280*  
   *Telecommunications, 280*  
   *Utilities, 280*  
 In-house repair, 115  
 Inquiries, 90  
 Installed base management, 101  
   *IBase, 101*  
   *Individual object, 101*  
   *IObject, 101*  
 Installed base object  
   *Object, 101*  
 Intellectual Property Management (IPM), 294  
 Interaction center, 49, 287, 305  
 Interaction channel analytics, 311, 339  
   *Interaction center, 340*  
   *Web channel, 340*  
 Interaction Layer (genIL), 248  
 Interactive selling, 159  
 Interactive voice response, 133  
 Internet Customer Self-Service  
   *ICSS, 136*

- Internet customer self-service portal, 136
  - Internet Pricing and Configurator
    - IPC*, 88
  - Internet Pricing and Configurator (IPC), 160, 162
  - Internet Pricing Configurator (IPC), 240
  - Internet Sales, 154
  - IP-PBXs, 129
- J**
- 
- Java 2 Platform Enterprise Edition (J2EE), 240
  - Java Database Connectivity (JDC), 240
  - Java Message Service (JMS), 240
  - Java Server Pages (JSP), 159
  - Java Virtual Machine (JVM), 240
- K**
- 
- Key performance indicator (KPI), 235
  - Knowledge management, 108, 171
    - Text Retrieval and EXtraction (TREX) engine*, 108
- L**
- 
- Large enterprise business, 30
  - Lead business systems analyst (BSA), 358
  - Lead management, 48, 73
  - List management, 68
- M**
- 
- Marketing analytics, 48, 75, 311
    - Campaign monitoring and success*, 314
    - Campaign planning*, 312
    - Lead analysis*, 315
    - Market budget planning*, 312
    - Market plan analysis*, 314
    - Target group optimization*, 313
  - Marketing automation, 66
  - Marketing plan
    - Campaign*, 62
    - Trade promotion*, 62
  - Marketing Resource Management (MRM), 48, 64
  - Master data, 253
    - Business partner*, 259
    - Customer*, 259
  - Material Safety Data Sheets (MSDS), 283
  - Microsoft Active Sync, 346
  - Microsoft Windows, 231
  - Mobile application, 305
  - Mobile Application Studio (MAS), 180
  - Mobile client, 180
  - Mobile Infrastructure (MI), 347
  - Mobile Sales Laptop solution, 185
  - Mobile Service, 191
    - Service order management*, 192
  - Mobile system landscape, 181
  - Multi-channel integration, 140
- N**
- 
- NetWeaver Application Server, 159
  - NetWeaver Mobile, 230
- O**
- 
- Object
    - component*, 101
  - Operational planning, 85
  - Opportunity management, 80, 86, 185
  - Order to cash, 163
  - Organizational master data, 267
    - Organizational attributes and business attributes*, 269
    - Organizational object*, 268
    - Organizational structure*, 267
    - Organizational unit*, 270

## P

---

PalmOSÆ operating system, 347  
 Partner and channel analytics, 223  
 Partner channel management, 305  
 Partner management, 202  
   *Partner compensation*, 208  
   *Partner networking*, 207  
   *Partner planning and forecasting*, 208  
   *Partner profiling and segmentation*, 205  
   *Partner recruitment*, 203  
   *Partner training and certification*, 205  
 Partner order management  
   *Collaborative showrooms*, 216  
   *Distributed order management*, 218  
   *Interactive selling and configuration*, 216  
   *POS and channel inventory*, 216  
   *Quotation and order management*, 215  
 Pay-for-promotion, 72  
 PBXs, 129  
 People-Centric User Interface  
   *PCUI*, 95  
 Personalization, 158  
 Planning and forecasting, 84  
 Point of Sale (POS) data, 285  
 Portfolio Management (xRPM), 296  
 Price and Margin Management, 286  
 Price optimization, 286  
 Pricing, 162  
 Pricing master data, 272  
 Pricing procedure, 275  
 Product analysis  
   *Product profitability*, 338  
 Product analytics, 337  
   *Cross-selling proposals*, 338  
 Product attribute, 264  
 Product category and hierarchy, 265  
 Product configuration and pricing, 80, 87

Product master data, 262  
 Product Modeling Environment  
   *PME*, 88  
 Product relationship, 266  
 Product search and display, 185  
 Product type, 263  
   *Financial Services*, 264  
   *Financing*, 264  
   *Intellectual Property*, 264  
   *Material*, 264  
   *Service*, 264  
   *Warranty*, 264  
 Project planning, 363  
 Push to talk, 133

## Q

---

Quotation and order management, 80, 89

## R

---

Realization phase, 364  
 Real-Time Offer Management (RTOM), 141  
 Recency, frequency, and monitor value (RFM), 313  
 Remote Function Cases (RFCs), 142  
 Resource planning, 107  
   *Route optimization*, 108  
   *Van stock*, 108

## S

---

SaaS, 58  
   *Software as a Service*, 58  
 Sales analytics, 81, 185, 320  
   *Activity management*, 321  
   *Billing*, 326  
   *Contract management*, 323  
   *Opportunity management*, 321  
   *Sales Funnel*, 324  
   *Sales performance*, 325  
   *Sales pipeline*, 324

- Sales quotation and order management*, 322
- Territory management*, 321
- Sales Configuration Engine
  - SCE*, 88, 273
- Sales order management, 185
- Sales planning and forecasting, 80
- Sales Pricing Engine
  - SPE*, 88, 273
- Sample management, 283
- SAP Business Information Warehouse (BI), 230
- SAP Business Information Warehouse (BW), 306
- SAPconnect, 140
- SAP CRM, 43
- SAP CRM Analytics, 53, 305
  - Interaction center analytics*, 54
  - Marketing analytics*, 53
  - Sales analytics*, 54
  - Service analytics*, 54
- SAP CRM interaction center, 123
- SAP CRM Marketing, 48
- SAP CRM Mobile application
  - Mobile Sales Laptop (MSA LPT)*, 178
  - Mobile Sales Online (MSOn)*, 178
- SAP CRM Mobile Application
  - Mobile Service Handheld (MSE HH)*, 178
  - Mobile Service Laptop (MSE LPT)*, 178
- SAP CRM Mobile Device
  - Mobile Sales Handheld (MSA HH)*, 178
- SAP CRM on-demand, 44
- SAP CRM on-premise, 44
- SAP CRM partner channel management, 199
- SAP CRM partner channel management solution map, 201
- SAP CRM Rental, 286
- SAP CRM Rule Modeler, 87
- SAP CRM Sales, 49
  - Activity management*, 183
  - Contact management*, 183
- SAP CRM Service , 100
  - SAP CRM Service Parts Management, 286
  - SAP CRM solution map, 47
  - SAP Direct Store Delivery (ERP), 180
  - SAP Enterprise Portal (EP), 230
  - SAP ERP, 44
  - SAP ERP Sales and Distribution (SD), 258
  - SAP Incentive and Commission Management (ICM), 290
  - SAP Internet Pricing and Configurator (IPC), 272
  - SAP Leasing, 291
  - SAP Mobile BI (NetWeaver), 180
  - SAP Mobile Procurement (SRM), 180
  - SAP Mobile Sales (CRM), 180
  - SAP Mobile Sales (ERP), 180
  - SAP Mobile Service (CRM), 180
  - SAP Mobile Time and Travel (ERP), 180
  - SAP Mobile Warehouse Management (SCM), 180
  - SAP NetWeaver, 229, 231
    - Adoptions in 2006*, 231
    - Composition platform*, 235
  - SAP NetWeaver Application Server, 84, 233
  - SAP NetWeaver Business Intelligence (BI), 306
  - SAP NetWeaver Business Process Management, 235
  - SAP NetWeaver. E-Commerce, 159
  - SAP NetWeaver Enterprise Portal, 236
  - SAP NetWeaver Exchange Infrastructure (SAP NetWeaver XI), 230
  - SAP NetWeaver Master Data Management (MDM), 254
  - SAP NetWeaver Process Integration (SAP NetWeaver PI), 238
  - SAP NetWeaver TREX, 236
  - SAP Price and Margin Management, 274
  - SAP Real-Time Offer Management, 63
  - SAP SME portfolio
    - Definition*, 56

SAP xApps Mobile Time and Travel, 94  
 SAP XI, 238  
 Segment and list management, 48  
 Segmentation, 67  
   *Customer segment, 67*  
 Segment Builder, 67  
 SEM-BPS, 94  
 Service analytics, 117, 327  
   *Service quality, 328*  
 Service contract management, 106  
 Service Level Agreement, 105  
   *SLA, 105*  
 Service management, 172  
 Service order, 112, 287  
 Service order and service ticket, 111  
 Service order management, 185  
 Service ticket, 112, 287  
 Shared-Service Center, 147  
   *SSC, 147*  
 Shelf management, 185  
 Small and medium business (SMB), 30  
 Smartphone  
   *Short Message Service (SMS), 348*  
 Specialty chemicals, 282  
 Strategic planning, 84  
 Subscription sales, 293  
 Supplier Relationship Management (SRM), 166  
 Supply Chain Management (SCM), 282

## T

---

Technical design, 359  
 Telco, 299  
 Telephone system hardware, 128  
 Territory management, 80, 85, 185  
 Three Pillars of SAP CRM, 45  
 Time and travel management, 81, 185  
 Total cost of ownership (TCO), 33  
 Trade Promotion Management (TPM), 48, 71  
 Transaction-related billing, 92  
 Transaction Tax Engine  
   *TTE, 88*

## U

---

Usability, 349  
 User acceptance testing (UAT), 359  
 User access, 343  
   *PDA Companion, 345*  
 User access mode  
   *Desktop/PC, 344*  
   *Handheld, 347*  
   *Laptop, 344*  
   *Notebook Computers, 345*  
   *Smartphone, 348*  
   *Tablet PC, 346*  
 User access modes, 344

## V

---

Varian Medical Systems , 371  
 Variant configuration, 273  
 Virtual interaction center, 124  
 Visit planning and route optimization, 185

## W

---

Warranty management, 103  
 Web auctions, 170  
 Web channel, 305  
 Web Channel Analytics, 173  
 Web Channel Enablement  
   *E-Analytics, 154*  
   *E-Commerce, 154*  
   *E-Marketing, 154*  
   *E-Service, 154*  
   *Web Channel Analytics, 154*  
 Web Channel Enablement solution, 153  
 Web chat, 137  
 Web form, 134, 136  
 Web Service Description Language (WSDL), 237  
 Web Services, 236  
 Windows Mobile 2003 SE, 346  
 Windows Mobile (WM) 2005, 346