

Building Customer Connections

Increase customer loyalty by simplifying how people work together to deliver business value

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The People Ready Business

*Inside your company is a powerful force:
A force that can cut costs, win customers,
and find innovative new business opportunities
all over the world.*

It's your people. Are they ready?



Executive Summary

Customer connections are the moments that define your business. Your people strive for those moments and your customers tell others about them. They are developed and maintained through all of the interactions across your business each day. Through their talent, knowledge, and passion, your people transform interactions into the impression that your company is committed to delivering greater value than your competitors. Building connections creates lasting value for your organization through increased customer loyalty.

In the short term, customer loyalty benefits your business through revenue growth as a result of repeat and referral business. In the long term, closer relationships with customers give your organization a window of insight into your customers' needs and preferences. With the cost to acquire new customers typically much greater than the cost of retaining existing ones, and profitability found to increase as much as 25 percent for every 5 percent increase in customer retention,¹ there's never been greater pressure or opportunity to invest in and foster the right customer connections.

As world economies become more integrated, unprecedented opportunities exist for businesses that can collaborate across boundaries with partners and customers to bring innovative, new products and services to market while differentiating from competitors through customer service excellence. Your people, and everyone they need to work with or obtain information from, are on the move. A study of the impact of mobile technologies found that mobile field solutions improved worker productivity by 27 percent and increased customer satisfaction 19 percent, resulting in positive business outcomes, including a 13 percent increase in services revenue and 17 percent more profitability.²

This white paper outlines some of today's challenges and trends as companies work to create the optimal customer experience and achieve anticipated value from their customer relationship management (CRM) investments. Consistent with positions taken by leading analysts such as Gartner,³ CRM is more than a one-time initiative or system implementation project. It may be more productive to think about CRM as an ongoing process of aligning business strategy, processes, enabling technologies, and culture to deliver the kind of customer experience that increases loyalty among your most profitable customers. To increase the value of customer relationships, your people need access to the right customer information and the ability to work across geographies and organizations with colleagues, partners, and customers.

¹ Reichheld, Frederick, "The Loyalty Effect," (Harvard Business School Press, 2001).

² "Best Practices in Mobile Field Service," (Aberdeen Group, June 2006).

³ Nelson, Scott D., "Ten Secrets of Creating a Customer-Centric Enterprise," (Gartner, Inc., December 22, 2005, ID #G00136913).

Companies continue to struggle with CRM investments, as suggested by studies that indicate as few as 14 percent of executives are fully satisfied with the impact CRM has had on productivity and only 10 percent strongly agree that they realized immediate value from CRM investments.⁴ Why are CRM investments often not delivering expected value? This question has been researched, debated, and speculated on for years. But it all seems to come down to one issue: CRM projects have been focused on 'one-size-fits-all' applications and business processes that do not allow people to work the way their jobs and customers require.

Customer experience needs to drive decisions and plans for CRM investments. Businesses need to re-evaluate and improve their customer management strategies and their approaches to interacting with their customers, in order to address the changes being driven by evolving expectations. Traditionally, the approach to customer management activities has typically been addressed through the introduction of technology in the form of CRM system solutions—solutions that have often fallen short of delivering the full anticipated value.

Companies have the opportunity to address customers' changing expectations. Companies that respond to these changes find they can build new competitive advantage. By demonstrating comprehensive collaboration across the enterprise, businesses find the opportunity to enrich the customer experience. This positive effect on the customer experience can generate increased loyalty and demand, while at the same time allowing the company to better manage its costs and improve its products and services.

A key element in changing customer management models is re-examining how the enterprise is defined and how it operates. In reality, the number of separate entities involved in defining and delivering products and services continues to expand, and the expansion drives the requirements and importance of organizational change. When redefining their strategy and delivery models, businesses need to consider changing operational factors and their impact on performance, and especially how these relate to the customer experience. Several significant factors affect operations when redefining the enterprise approach:

- With increasing globalization, customers expect to receive comparable levels of service across geographies, regardless of the delivery mechanism.
- Outsourcing continues to expand the number of stakeholders in building services and products and in delivering them to customers.
- Increasing business execution through multiple distribution channels or partners introduces a shared responsibility for selling, delivering, and supporting products and services.
- Increasing product complexity and the race for innovation require a more broad-based use of expertise to design and build products across businesses.

Businesses that successfully change their customer relationship management models work to collaborate more closely with the extended network of partners, suppliers, and outsourcers in their value chain. Often, these partners play a critical role in the customer experience. This can create its own set of problems if effective tools for sharing customer information and working with these partners are not available, including inconsistency, lower quality, and lost sales due to poor visibility to some customer interactions. Businesses need to extend their customer management programs to include collaboration across the full value chain; they need to learn to

⁴ Band, William, "Best Practices: People Plus Technology Determines CRM Success," (Forrester Research, Inc., May 31, 2005).

operate as seamless extended enterprises, functioning virtually to get everyone involved to focus on the specific needs of the customer. Businesses also need to understand how to share this information effectively across the extended enterprise to include and improve the customer experience.

Building this competitive advantage in the customer-centric arena often requires a change in the thinking and culture of the company and the way it considers the customer in its strategy. These changes result in a need for greater intimacy and communication with customers and collaboration capabilities across the ecosystem.

Microsoft software capabilities are uniquely positioned to help companies deliver the transformation toward customer-centric performance. New tools and technologies can help you reach new heights in enhancing and empowering effective customer management activity. Microsoft is bringing new capabilities to the market that help businesses transform, not merely to introduce a new set of productivity tools for users. The focus on communication and collaboration helps resources across the extended enterprise deliver heightened customer experiences. These capabilities can be used as stand-alone enhancers or as extensions to existing customer management systems that enable you to get more from existing investments. Microsoft software capabilities offer a comprehensive customer management approach designed to help you deliver the best possible experience for your customers.

Microsoft is listening and responding. The company works extensively through its partners to help you attain the benefits of these new capabilities. Partners in the Microsoft network, from small business specialists to global enterprise integrators, are trained on customer-management technologies and are prepared to help you make take full advantage of them. According to Robert DeMaio, Chief Executive of Microsoft partner Relavis, "Providing our customers with solutions based on Microsoft CRM technology will help them perform better in acquiring and maintaining customers. Microsoft brings an incredible record of development quality and innovative products and has made the commitment to evolve, so we can help our customers be not only flexible and responsive to their markets, but smarter than their competitors."

Maximizing the value of customer relationships

People working with people: that is the key to business success. Employees drive business outcomes that include developing and maintaining customer relationships through working with partners to enhance customer experiences. The result of these relationships, and the resulting customer experience, affects business results.

Although these have long been key objectives, they are now being dealt with differently and with greater priority. Leading companies address these goals by changing the way they think about and shape the customer experience. Leaders across industries, from large to midsize enterprises, are changing the way they do business to get more value from their customer management activities. They are empowering their customer-facing people and partners by providing tools that improve customer insight and simplify how these parties work together.

Dell is often cited for its customer interaction innovation.⁵ The company has succeeded in driving outstanding growth by managing an innovative business model based on selling customized, built-to-order personal computers directly to consumers. Dell can offer customized computers built to customer requirements, and allow customers to track orders in real time, arrange servicing, and access technical support online. Not only does this help Dell meet customer expectations, but real-time access to sales figures provides timely feedback on new offers to assess the effectiveness of each offer. Implementing this business model required the management of an extensive, connected value chain. This made it necessary to connect all information, from the end users' placement of orders across the spectrum of the supplier and contractor network. The resulting customer experience was a seamless process that improved customer satisfaction and was cost-effective for Dell.

Nikon, known for its innovations in cameras, lenses, and other optical products, developed a new customer management strategy to respond to rapid changes in the marketplace.⁶ The industry saw a decrease of brand loyalty as well as changes in customer buying patterns. In response, Nikon developed a strategy focused on customer service as the cornerstone for a new program. Nikon decided to improve its responsiveness in the services area, where critical interactions take place. The strategy was based on the empowerment of people: the key to change was people using the right processes and improved tools. Through these changes Nikon was able to reduce turnaround time in responding to customer requests by 75 percent. Nikon was able to build a competitive advantage in the market based on the experience they extended to their customers.

eSilicon, a midsize company, was ranked among the fastest growing businesses listed in the Inc. 500⁷ in 2005. eSilicon provides custom microchips for everything from MP3 players to complex communications systems. It built a business model that did not include any internal manufacturing capability; it acts as a general contractor that oversees a large cadre of highly-skilled subcontractors. Teams focus on working with customers to build tailor-made solutions that satisfy customer expectations. This relationship is enabled by effective customer collaboration tools that connect eSilicon with its suppliers and customers, providing eSilicon with updated and reliable information on products and order status.

Evolving customer management approaches

To address the ever-changing challenges of competition, expansion into new markets, and the management of costs, businesses change their customer relationship management models. Businesses increasingly rely on partners, suppliers, and outsourcers to manage segments of the customer experience. This creates its own set of problems, including inconsistency, lower quality, and lost visibility to some customer interactions. Businesses need to extend their customer management programs to include collaboration across the value chain and involve both suppliers and partners in making the customer experience more rewarding. Businesses also need to operate as seamless extended enterprises, functioning virtually to get everyone involved to focus on the specific needs of the customer.

⁵ Multiple sources: the Dell website (www.dell.com): "Use it or lose it: the power of information" a Capgemini whitepaper, 2006; and <http://marketing.byu.edu/htmlpages/courses/490r/chapters/chapter7/chapter7.html#dell>

⁶ "Turning Customer Experience Into Competitive Edge: Nikon's Journey to Leadership," a case study published by Peppers & Rogers Group and Right Now Technologies, 2006, <http://www.rightnow.com/resource/customer-service-software-whitepapers.html>

⁷ Inc Magazine, August 2006, <http://www.inc.com/resources/inc500/2005/>

The traditional approach to customer management, heavily focused on systems solutions, does not meet the requirements for collaborating with customers and involving them intimately in the solution experience. To win in this rapidly changing environment it is essential that the company not only knows its customers and their preferences, but also understands how to share this information effectively across the value chain to improve the customer experience. Businesses today must develop an extended set of capabilities to collaborate across the virtual enterprise. They need expanded customer management that begins with customer information and extends through a closed-loop feedback process; provides for collaborative communications; and promotes the sharing of tools and infrastructure. This new virtual enterprise comprises the company and its employees, its suppliers, distributors, business partners, and the customer to complete a closed-loop network.

Collaboration across the network

Businesses must evolve toward an increasingly customer-centric model in order to survive and prosper. Companies need to re-evaluate and improve their customer management approaches to address changes in customer expectations. The traditional approach to customer management, often addressed through the introduction of CRM systems solutions, has not delivered the full value that many anticipated. This systems approach has often fallen short of delivering a fully-integrated customer solution, at best meeting enterprise-level requirements, but seldom expanding into the realm of integrating the customer experience.

People remain key to providing effective customer management as they continue to be the face of the business. People can make smart decisions, find new value in existing systems, react to changing customer demands, and take advantage of new market opportunities when provided with the right tools and guidelines.

Increasing customer expectations

Across industries, customer expectations evolve toward more individualized attention. Customers expect greater customization or personalization, faster delivery, more sophisticated after-sales support, and additional life cycle services bundled into the original offer. This evolution introduces new challenges for companies such as the following:

- How to acquire knowledge of customer buying patterns throughout the life cycle and how to share that knowledge across the extended enterprise.
- How to develop the means to anticipate future customer needs: the ability to follow market shifts or build first-mover advantage as the market transforms.
- How to understand who the customers are, which ones are most important to the company, and how to segment the customer base. These are required to provide responsiveness that adapts to both the customer expectations and entitlement.
- How to coordinate globally distributed teams to deliver more responsive support to customers.

These challenges need to be met through increased communication with customers and streamlined, collaborative processes across the extended network.

Extending the enterprise

Collaboration across this extended enterprise affects the fundamental go-to-market processes for the company. Whether dealing with product development or a complex sales process, companies need to include inputs from multiple parties. Effective coordination among these parties should positively affect the overall experience in areas such as lead-time reduction, development budget control, effectiveness of delivery, and the cost to serve. Processes and tools that enable team collaboration are key to building competitive advantage.

Multichannel connections

The development and advances in technology have led to an increase in the number of contact points and communication channels available to customers, such as the Web, phone, fax, e-mail, instant messaging, kiosks, and virtual branches. Customers increasingly want and expect to communicate through their channel of choice. This multichannel capability introduces new challenges for companies in terms of organization, culture, and processes, including:

- **Self-service:** More and more customers want, and are willing, to take charge of their own experience with their supplier. Once they have direct access to company systems, they can qualify their needs, place and track orders, and access after-sales services. In addition to accessing information through self-service, customers using these channels can chat live with customer support, advisors, or even their local sales representative.
- **Supplier-customer integration:** Customers expect their suppliers to simplify the way they work together, using enablers such as e-procurement, requirements definition, and co-development solutions. This is not merely a tools issue, as many companies had previously thought, but rather a consideration for communication that needs to be integrated in the way companies conduct business.
- **Information management:** The burgeoning number of contact channels requires that companies treat information and customer needs on a real-time basis, that they ensure consistency of the information across the channels, and that they secure customer information. Management of this information is becoming more challenging and complex due to the integration of technologies and the need to access data as information while maintaining confidentiality and privacy of customer information.
- **External partner integration:** As business partners become more involved in delivering products and services, they start to interact directly with customers and can influence a customer's experience and loyalty to the supplier. Companies need to have visibility to all customer interactions in order to maintain connection and understanding of their requirements and experiences, while maintaining an integrated information or communication path with the partner.

Collaboration enhances customer experience

The customers' experience is shaped by every interaction that your organization has with them. These interactions may occur through a direct, customer-facing person in your organization or through another channel. Regardless, the experience from their

interactions will be representative of the total company, not just the people within your own enterprise; these may include suppliers, alliance partners, or channel partners who are dependent on their involvement in the customer interaction. Managing the holistic experience with the customer is possible through effective collaboration, no matter where the touch point occurs.

Companies that demonstrate comprehensive collaboration across the extended enterprise have the opportunity to enrich the customer experience. The positive effect on the customer experience can generate more loyalty and demand, while at the same time helping the businesses better manage their costs and improve their product or services designs. Improving the customer experience and making it more personal and interactive can have positive results: retention and loyalty improve, repeat purchases increase, and more positive informal referencing transpires.

A collaborative approach focuses on the customer expectation being addressed. The approach can range from internal development of a response for the customer, to direct customer interaction and feedback through a collective communication that includes both internal and external parties. Collaboration is essential and may occur anywhere within the marketing, sales, service, and knowledge cycle. The greater the degree of collaboration as it relates to the customer solution, the more positive the customer experience.

Collaboration across the extended enterprise: This type of collaboration involves not only a company and its employees, but also its suppliers and partners. This brings all parties together to develop a customer solution. By working with all members of the value chain, companies can better utilize customer input and integrate the unique skills of each member to provide the best possible experience for the customer. This process helps to ensure that functionality, fit for use, and cost-effective development and pricing are all covered for benefit to the customer.

Collaboration across internal teams: This collaboration involves bringing together company resources to deliver value for customers. An organization needs to be agile, resourceful, and proactive when interacting with customers. To do this, the organization must be able to coordinate and utilize collaboration tools to locate experts across the organization who have the expertise to satisfy customer needs. Customer responsiveness necessitates rapid access to the organization's best assets, regardless of physical location or divisional alignment. By enabling increased collaboration, experts will be able to solve the critical customer issues and thus create memorable customer experiences and lasting relationships.

Collaboration directly with the customer: This involves direct interaction with the customer to foster loyalty and satisfaction. Collaborative tools allow for better understanding of customers and enable more focused offerings to meet their expectations. Integrating customer information and being able to work directly with customers creates relationships that are based on mutual value. This customer-centric approach provides for lasting relationships based on invaluable teamwork and partnerships among organizations, and retains the competitive advantage for the organization.

Bringing Customer Connections to life

The following sections present examples of how our customers and partners are achieving more value from their customer relationships.

- **Launch New Products or Services:** Increase marketing campaign and go-to-market effectiveness.
- **Win New Business:** Improve sales productivity by simplifying how people work together to create high-impact proposals.
- **Deliver Responsive Service:** Enable people to rapidly identify and resolve customer issues.

Launch New Products or Services

The speed and effectiveness with which a company takes a new product or service offering to market directly affects market share, revenue, and costs. Many companies struggle with the complexity of orchestrating go-to-market initiatives across multiple channels. Field sales teams, distributors, dealers, and partners (such as retailers) need to participate in generating demand for the new product or service through public events, online experiences, advertising campaigns, and new promotions. Multiple teams and organizations play critical roles in positioning the new product or service for success in the market. The various people and teams need to work in a highly coordinated way to target the right customers and sell the new offering with a consistent, differentiated value proposition. Companies unable to rapidly educate all the right field sales teams, marketing staff, and partners on important aspects of launch such as product features, pricing, competitive positioning, and warranty or support terms take the risk of confusing customers with local variations or other interpretations of their customer promise.

To improve the impact of marketing campaigns and accelerate the roll-out of new products and services, companies need tools that enable people to work together more effectively, with a complete view of each customer so as to create and run better marketing campaigns. Companies that use tools with team spaces and workflow capabilities can improve control over the proposal submission process, and by using integrated content management, business intelligence, and collaborative capabilities they can help increase the effectiveness and efficiency of the proposal process. Microsoft helps increase the impact of marketing new products or services by enabling brand managers and marketing professionals to work together securely with field sales teams, channel/alliance partners, and customers to create, execute, and track more effective campaigns.

Microsoft can help your organization launch new products faster by providing the following capabilities:

- Enable marketing professionals to communicate and work more closely with field teams and channel partners, resulting in increased consistency in new launches.
- Coordinate campaign and launch activities, materials, and resources, resulting in maximized return on marketing investments by identifying and reaching the highest-value customers.
- Share information in a secure, interactive working environment, resulting in real-time sales support and competitive information for field teams and channel partners.

By providing people with the right customer information and tools to work together to launch new products or services, companies can increase their return on marketing investments and grow market share by getting products to customers faster than ever. Microsoft software enables sales and marketing teams across geographies and organizations to share information through online collaborative workspaces and provide field representatives with access to the most updated customer information and campaign materials—anytime and anywhere.

Customer success story: Nikon improves time-to-market with solution and support for mobile messaging

Since it was founded in 1917, Nikon Corporation has been a leading manufacturer of camera and imaging equipment. The company employs more than 16,000 people and reported more than USD \$5.9 billion of revenue in 2005.

Manufacturers must be agile to compete in the fast-paced, constantly changing imaging industry. Nikon relies on the latest advances in information technology to stay one step ahead of its competitors. “Nikon aims to strengthen and reinforce collaboration between the member companies of the Nikon Group so that management is agile enough to quickly adapt to change,” says Yoshiyasu Iizuka, General Manager of the Information Systems Department at Nikon Corporation. “At the same time, we want to set up policies for information security to promote stronger management of information.”

Many Nikon managers spend a great deal of time away from the office meeting with clients. In the past, decisions often had to be postponed until executives arrived at their destinations, hampering the company’s ability to close deals quickly. Nikon wanted its executives—regardless of their location—to have the tools they needed to access messages and other pertinent information, make critical decisions, and conclude transactions as quickly as possible.

To achieve these goals, Nikon implemented a comprehensive new messaging solution using Microsoft® Exchange Server 2007 and Microsoft Office SharePoint® Server 2007. For its executives, Nikon chose mobile devices powered by Windows Mobile® 5.0 because of the security and real-time access that it provides by interacting with Exchange Server 2007.

With Exchange Server 2007 and Windows Mobile-powered devices, executives have access to their e-mail messages and other information even when they are away from the office. With Direct Push technology in Exchange Server 2007, employees who use mobile devices receive updates to their e-mail inbox, calendar, tasks, and contacts as soon as they arrive on the server. “With these products, employees can view their calendars and e-mail messages all in one place, in real time,” says Iizuka.

Customer success story: International design firm improves customer relationships with new extranet solution

For more than 22 years, Ziba Design has created ideas and experiences for companies in the high-technology, consumer, medical, and service industries. With headquarters in Oregon and satellite offices in Southern California, Germany, China, and Japan, the company employs 130 people and serves a variety of customers, from small startups to Fortune 100 companies.

During each design project, many documents and other materials are shared between Ziba project teams and customers. The company used to share large files with customers by posting them to file transfer protocol (FTP) sites, but this often led to problems when customers had difficulty navigating the sites, or when customer firewalls blocked access to them.

Ziba wanted to create a process for project teams to share information with customers that would offer a unique experience. "Interaction with the customer is everything," says Dieter Reuther, Director of Information Technology at Ziba. "We needed to bring our project process and information-sharing practices up to par with the rest of our business in order to deliver the best possible customer experience."

After evaluating several alternatives including IBM Workplace, Ziba decided to create a customer extranet built on Microsoft Office SharePoint Server 2007 and Windows® SharePoint Services 2.0. Says Reuther, "None of the other products we evaluated offered as complete a solution as SharePoint Server 2007, [which] had all that we wanted—search, file sharing, item-level security, version control, and more."

Now the company has an extranet that expresses its unique look and feel, improves the customer experience, and helps streamline the project process—all at a reasonable cost to the company. Ziba executives expect a better connection between customers and design teams due to reduced file sharing frustrations. They also believe the new extranet will help teams reduce production times due to centralized document repositories and consistent methods for organizing files and tracking changes.

Win New Business

In order to drive profitable growth and improve sales productivity, businesses must not only sell to existing customers but also win new business. Simplifying the process of how people work together to pursue business opportunities is imperative. To reach out to the customers with the most potential and win their business, information about their needs must be readily available. During the proposal writing process, team members and other colleagues need a way to collaborate across organizational boundaries and geographies to share information, such as previous proposal content. Sales professionals need a way to easily collaborate and find insightful information quickly, even though expertise is often spread across the organization or geography, which prevents segmentation and targeting of the most profitable customers. Challenges also arise when companies lack collaboration tools, workspaces, and the capabilities to find and share customer information. Thus, gathering expertise and information becomes time-consuming and costly.

Microsoft answers these challenges with the familiar Microsoft Office Enterprise 2007 products, which help businesses collaborate easily on sales proposals. The tools help identify and develop new business opportunities by making it easier for sales professionals to find and use customer information and expertise while working with colleagues, partners, or subcontractors to create and deliver high-impact proposals. Online workspaces enable teams to collaborate on proposals, hold meetings with individuals and groups from any location, and quickly locate expertise. Microsoft integrated tools provide automated approval processes, digital signoffs, and a centralized repository to more securely share valuable proposal and customer information. With Microsoft technology, information workers can manage communication better, work together in teams more effectively, access people and information, and streamline business processes using structured workflow capabilities integrated with familiar desktop applications.

Microsoft tools can help your organization simplify working together to pursue business opportunities by providing the following capabilities:

- Identify and manage new opportunities. This improves the success rates of proposals based on easy access to both relevant material and experts across the organization, including partners.
- Find people, information, and expertise to accelerate and enrich proposal development. This helps shorten proposal development time through streamlining the workflows and validation process and through meeting customer deadlines.
- Improve collaboration among proposal developers, regardless of location. This helps decrease business development costs based on streamlined processes and a shorter overall proposal development time.

Customer success story: Marketer uses proposal generation system to reduce proposal prep time by 60 percent

HealthSTAR Communications is a leading healthcare marketing services company, with approximately 400 employees in 13 locations around the world and annual revenues of USD \$220 million. HealthSTAR was facing challenges in responding to increasingly complex customer requests for proposal (RFPs). Each RFP was requiring at least 40 hours of work spread across 4 to 8 HealthSTAR executives. The company wanted to produce proposals more efficiently by automating the process, providing easy access to standardized proposal content, and shifting executive time savings to developing strategic vision. To do this, executives needed to be able to access stored content from a number of areas, including individual hard disks and network file servers.

HealthSTAR created a proposal generation solution that allows authors to search for standard content stored in a Microsoft Office SharePoint Server 2007 site from within Microsoft Office Word 2007. Says Lloyd Chesney, Senior Vice President of IT, HealthSTAR Communications, "We realized that we could build our own proposal generation solution from the 2007 Microsoft Office system and expand it any way that we wanted, without expensive third-party customizations."

The new solution is expected to reduce proposal preparation time by 60 percent and enable HealthSTAR to reduce the amount of executive time spent on information searches. Mid-level employees will be able to assist in the

proposal development process using standard language in Office Word 2007 documents hosted on an Office SharePoint Server 2007 site. By reducing executive time spent on proposals, HealthSTAR estimates that it will realize \$500,000 in annual productivity savings that can be redirected to closing deals and building customer relationships.

Customer success story: South African financial group increases insight into customer opportunities and capitalizes on cross-selling
Sasfin Bank Limited is an independent banking and financial services group in South Africa. Sasfin offers numerous services to a number of customer types and verticals, but each Sasfin business group has a separate transaction processing system, which means customer information and details about sales opportunities is housed in heterogeneous databases organization-wide. Sasfin therefore has no single view of a customer, which hinders agility in decision-making, cross-selling, and analysis of customer interaction with the various business units.

Sasfin Bank plans to concurrently implement Microsoft Office SharePoint Server 2007 and Microsoft Dynamics™ CRM 3.0 to provide its employees with a single, consolidated content management system where employees across business groups can quickly access, search, and capitalize on customer opportunities in a much more organized manner.

Using new Microsoft Office InfoPath® Forms Services technology in Office SharePoint Server 2007, employees will have a unified method for viewing customer activities, both through a browser and when they are offline. Microsoft BizTalk® Server 2006 logic and internal application integration services enable data provided through these forms to be automatically updated on the server where customer records are stored. Sasfin also plans to use new data processing capabilities offered through Microsoft Office Excel® 2007 to provide greater insight into customer interactions and cross-selling opportunities. New server-based Excel Services technology will provide management with the ability to quickly render large Microsoft PivotTable® reports through a browser and share them cross-departmentally.

Says Peter Oeschger, Chief Information Officer of Sasfin Bank, "The 2007 Microsoft Office system infrastructure will provide a significant increase in the amount of business data accessible and the speed at which it can be accessed. This will not only have a positive impact on user productivity, but will help Sasfin better serve its customers and improve business agility and decision-making."

Deliver Responsive Service: Enable people to rapidly identify and resolve customer issues

Customers have increasing expectations for support and diminishing tolerance for slow or less-than-complete responsiveness. The challenge in pursuing responsive customer service lies in collecting pertinent information and getting the right people involved quickly. Many businesses own multiple, disparate communication tools and systems that overwhelm employees with too many sources of incoming information, thereby making it a challenge to prioritize and take effective action. Responding to

customers with “one face” is essential, as multiple handoffs or message forwarding result in customer dissatisfaction and affect customer loyalty and retention.

The business imperative is to increase customer satisfaction and loyalty by enabling customer-facing individuals and teams (call center reps, account teams, field service technicians, and channel partners) to identify, collaborate on, and resolve critical customer issues through timely access to customer information and one another. By building a platform to answer these challenges, you will be able to automate service processes, resolve issues quickly and accurately, and find qualified service professionals to deliver value-added service to your customers. Microsoft can help you proactively measure customer satisfaction during each service interaction to ensure long-term customer loyalty. Microsoft integrated tools can help you manage your sales, service, and marketing relationships through a centralized repository and identifiable document libraries. The platform spans capabilities for instant messaging, voice messaging, Web conferencing, collaborative workspaces, and portals to enable customer service representatives to collaborate with individuals across boundaries.

Microsoft tools can help your organization deliver more responsive customer service, increase customer satisfaction, and detect new business opportunities by providing the following capabilities:

- § Locate the right information and expertise rapidly, resulting in increased customer satisfaction and loyalty through easy access to information that better answers your customers' requests.
- Resolve customer issues quickly: develop a better understanding of customers, products, and experiences, so you can identify up-sell and cross-sell opportunities.
- Deliver proactive customer support through open communications, enabling your organization to better detect opportunities due to easy access to customer and sales data.

By focusing on more responsive customer service and by centralizing repository data for easy access to all employees, you can better manage your most valuable customers and increase overall customer loyalty.

Customer success story: AXA streamlines customer service with new portal solution

AXA Assistance Germany GmbH (AXA) is an international insurance-services company that offers help and advice to customers 24 hours a day, seven days a week. AXA service center employees in Munich field a variety of calls and, to address customer queries, must search and aggregate information from disparate sources. With the help of Microsoft partner Singhammer eDMS Consulting, AXA deployed a Web-based portal solution to centralize information and help its customer service employees resolve queries faster. The infrastructure, based on Microsoft SharePoint Products and Technologies, was rolled out in just two months—without the need for complex customization or additional third-party software.

AXA Assistance Germany is a member of AXA Assistance Group, an international company offering assistance services across multiple industries.

Its services include health information, legal advice, medical and motor assistance, and information on insurance for the retail and travel sectors. Employees at 36 emergency call centers worldwide receive calls that require concise, accurate, and current information on AXA customers and services. At the AXA service center in Munich, 180 customer-service employees must process a wide variety of calls—at any time of the day or night. In a modern service company such as AXA, expert advice and prompt customer service play an important role. With 3,500 employees and 8,000 correspondence partners, the company needs to ensure that all employees have access to a variety of documents, as well as up-to-date customer data. Resolving customer problems requires a system that can be used to access key information from a single source in a short period of time.

With its new solution, AXA is helping its service center employees worldwide deliver a higher level of customer service. Employees at every AXA service center—from Munich to New Zealand—have the same information at their disposal. Global access means that all employees can work on a single version of documents and share best practices and information with confidence.

Customer success story: Manufacturer reengineers intranet to improve responsiveness to customers

Hexcel's lightweight, high-performance reinforcement products and composite materials and structures are purchased by organizations as diverse as aircraft manufacturers and sporting goods companies. Hexcel employs about 4,500 people worldwide and has annual revenues of more than USD \$1 billion.

As Hexcel experienced growth across its diverse markets, the customer service department found it challenging to keep up with rapidly expanding customer needs. The company's intranet, HexLink, was designed as a single place to access product, customer, and company information, but it was difficult to use and often out-of-date. HexLink's document management functions were limited, so employees bypassed it by routing documents to one another by e-mail, creating versioning problems. HexLink also had no search or collaboration capabilities. All these inefficiencies translated to slower responses to customers.

Hexcel wanted to transform HexLink into a valuable business tool that would enable employees to publish and find information quickly without incurring exorbitant support costs. The company reengineered the U.S. customer service section of HexLink using Microsoft Office SharePoint Server 2007. Now, when users want to publish information to HexLink, they make a request within Office SharePoint Server 2007, which will process the request automatically, authenticating users through the Active Directory® service, part of the Microsoft Windows Server® 2003 operating system. Authors will be able to set access permissions at the group, user, and document levels.

Using Office SharePoint Server 2007, Hexcel has a vibrant pilot intranet that will save time for employees who respond to customers by providing a central place to store knowledge. Instead of sending documents as e-mail attachments, team members can now check documents in and out of Office SharePoint Server 2007 document libraries that have automatic version

control. "Employees won't need to search far and wide for information; accurate content is stored in Office SharePoint Server 2007, where they can access it quickly and get answers to customers faster," says Becky Carlson, Customer Service Supervisor for Hexcel Corporation.

Are you ready?

Your people set you apart from the competition. Their creativity and passion spark innovation and fuel growth. Their dedication brings in new customers and keeps the old ones coming back time and again. But the world is changing fast. More people from more companies shape your customers' experience. Customers increasingly expecting more value and innovation in the products and services they purchase as well as greater ease in the channels available to interact with your company. Are your people ready to deliver it?

To build lasting customer connections you need to empower your people with the right tools to work together across organizations and geographies with instant access to customer information. The challenges and potential failures of prior CRM projects should not stand in the way of efforts to create a more customer-centric enterprise that delivers the kind of customer experience that promotes intense loyalty. Talk to your local Microsoft representative or Microsoft Certified Partner to learn more about the role technology can play in improving your sales productivity, marketing impact and service responsiveness.

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