

SAP CRM 2007

Overview



SAP CRM 2007 – Interaction Center

Overview

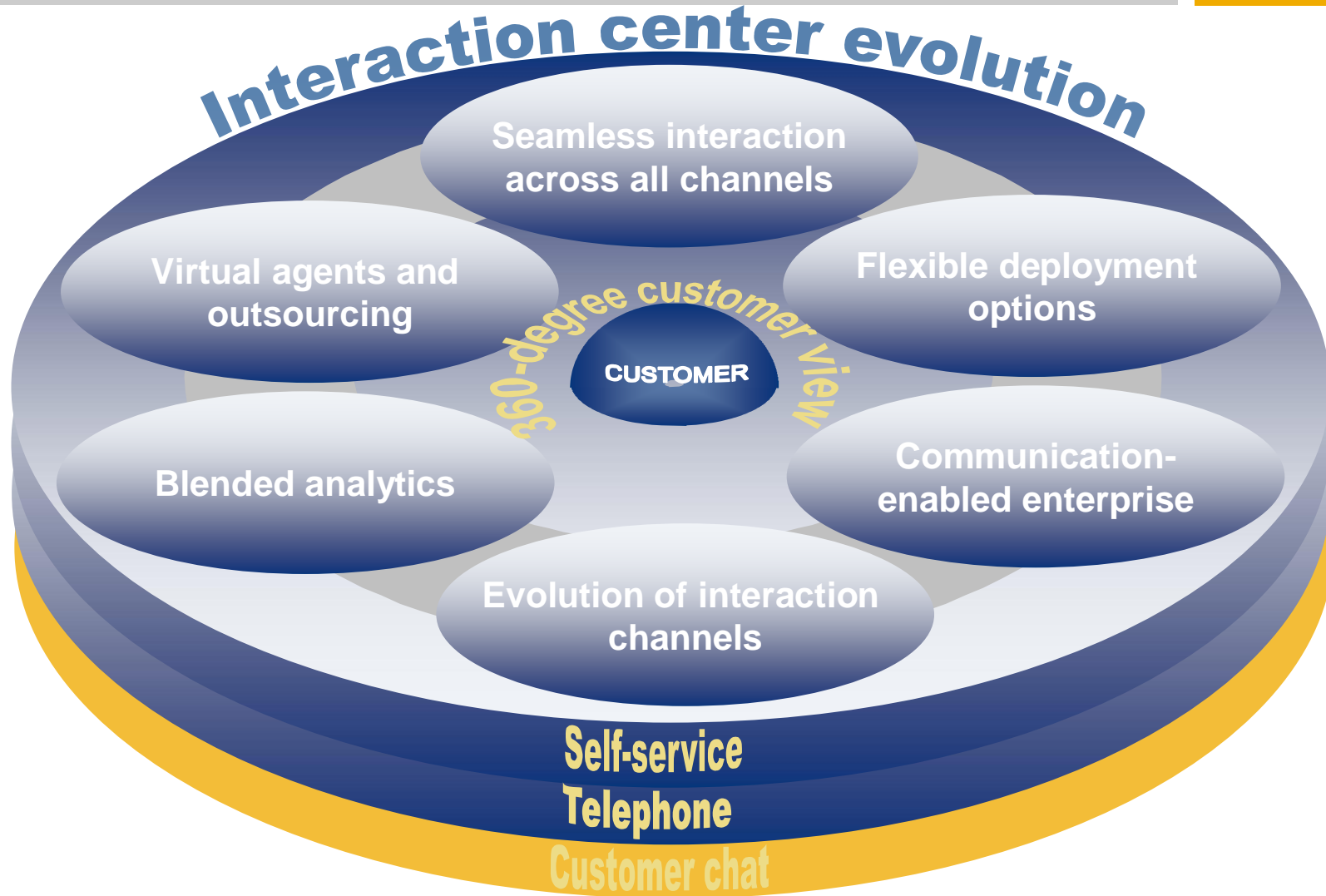
THE BEST-RUN BUSINESSES RUN SAP™



Content



- 1. Trends and Challenges – Interaction Center**
2. Interaction Center
 - 2.1 Overview
 - 2.2 IC Agent – Details
 - 2.3 IC Sales & Marketing – Details
 - 2.4 IC Service – Details
 - 2.5 IC Management – Details
 - 2.6 Rule-Based Guidance & Automation – Details
 - 2.7 IC Multi-Channel - Details
3. Positioning and Benefits



Customers choose the interaction channel

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Interaction Center – Scenarios and Processes



Customer



Telephony

Postal letters

Web

IVR

E-Mail

Interaction Center: capabilities

Telemarketing

Campaign execution

Lead management

Personalization

Telesales

Account and contact management

Lead and opportunity management

Quotation and order management

Customer service

Customer service and support

Complaint management

Help desk & Shared services center

IC management

Communication channels

E-Mail Response Management

Process modeling and agent guidance

Interaction center: analytics

Basic analytics

Process-based analytics

Blended analytics

Profitability analytics

Content



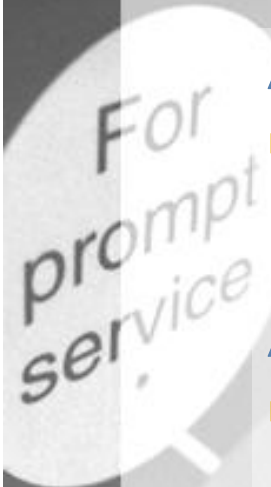
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Interaction Center – Agent Desktop



The screenshot shows the SAP Interaction Center Agent Desktop interface. The components are labeled as follows:

- Scratch pad:** Located at the top left, above the account information.
- Account info:** Located at the top left, showing the agent's name (John Taylor) and the customer's name (Media Store).
- Alerts:** Located at the top center, displaying a message: "This is a 'Gold Customer'".
- Communication information:** Located at the top right, showing the customer's status (Ready/Not Ready).
- Toolbar:** Located below the account info, containing various action buttons like Accept, Reject, Hold, etc.
- Navigation bar:** A vertical blue bar on the left side containing menu items such as Account Identification, Interaction Record, Leads, Opportunity, Sales Orders, etc.
- Broadcast messages:** Located at the bottom left, pointing to the navigation bar area.
- Workspace:** The main area of the interface containing the Interaction Record (13717), Notes, Activity Clipboard, and Interaction History table.



Account Identification

- The account identification screen allows agents to search for and identify, display, change and create accounts, their related partners as well as related objects like registered products

Account Fact Sheet

- The Account Factsheet (AFS) gives the agents access to the most relevant customer related information, e.g. service ticket history, sales history, open marketing campaigns, ...

Interaction Record

- The Interaction Record allows agents to log all inbound and outbound interactions (phone calls, e-mails, chat, ...)

Account Identification



Interaction Center SAP

John Taylor
Media Store

Navigate
Time to wrap up!

Accept Reject Hold Retrieve Hang Up Transfer Warm Transfer Consult Conference Toggle End Dial Pad Ready Not Ready

Identify Account (ID: 3271) Back

Account More Fields Installed Base Object

Version: Standard

First Name/Last Name: John Taylor

Function: 02 Head of purchasing

Department: 0002 Purchasing

Account: Media Store

Street/House Number: Pike Street 489

City: ANTIOCH

Postal Code/Region: 60002 IL Illinois

Country: US USA

Contact Info For: Contact Person

Telephone/Extension: 847-643 7984

Fax/Extension: 847-643 7985

E-Mail Address: john.taylor@tdcdemomail.sap-ag.de

Installed Base: 663

Component: 668

Identification: HT1011NTB875345

Description: Notebook Professional 17

Product ID: HT-1011

Product Description: Notebook Professional 17

Product Type: Material

[Confirm](#) [More Details](#) [Clear](#)

[Confirm](#) [Save](#) [Cancel](#) [Related](#) [Print](#)

Notes History | **Last Interactions** Interaction History

Return to Current Interaction Record ✎

| Date | Time | Channel | Description | Transaction No. | Status |
|------------|-------|----------------|-------------|-----------------|------------------------|
| 09.10.2007 | 09:36 | Date | | 11916 | Contains Errors Open |
| 09.10.2007 | 00:00 | Telephone call | Ticket 162 | 8000009336 | Open Distribution lock |
| 20.09.2007 | 18:23 | Telephone call | | 8206 | Contains Errors Open |
| 20.09.2007 | 18:16 | Telephone call | | 8205 | Contains Errors Open |

Agent Inbox

- The Agent Inbox is a universal inbox for e-mails, fax, letters, CRM business transactions (service tickets, sales orders, ...), ERP sales orders, cases, and workflow items

Email editor

- The e-mail editor allows agents to handle inbound and outbound e-mail, using pre-defined responses, e-mail templates, and solutions from the knowledge database

Interactive Scripting

- Interactive scripts help interaction center agents by leading through certain interactions they have to do while working with customers

Interactive Scripting – Guide Agents Through Service Calls



Interaction Center SAP

John Taylor
Media Store

Business partner found .
Navigate

Accept Reject Hold Retrieve Hang Up Transfer Warm Transfer Consult Conference Toggle End Dial Pad Ready Not Ready

Scripts

Back

Account Identification

Account Fact Sheet

Account Overview

Interaction Record

Interaction History

Leads

Opportunity

Sales Orders

ERP Sales Order

Sales Tickets

Complaints

Service Orders

Service Tickets

Case

Knowledge Search

Document Search

Campaigns

Script

Fax

Letter

Index

Inbox

Details

Launch: Lang:

Objection:

Could we just update your address?

Street address:

House number:

City:

ZIP Code:

District:

Country:

Overview

| Hierarchy | |
|-----------|--------------------|
| ▼ | Intro |
| ✓ | Welcome |
| 📄 | SAP Help |
| ▼ | Update Address |
| 📄 | Update Address |
| ▼ | Lead |
| 📄 | Lead |
| 📄 | Time For Questions |
| ▼ | Bye |
| 📄 | Bye |

Script Feedback ⏪ ◀ ▶ ⏩

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SAP ERP Sales Order

- CRM Interaction Center user interface directly linked to ERP sales order management
- Combines ERP sales functionality with CRM marketing product proposals

CRM Sales Order and Sales Ticket

- Sales Order for B2B environments focusing on fast entry of high numbers of line items.
- Sales Ticket for B2C grouping all relevant data on one screen

Product Search and Product Proposals

- Product search is supported in various flavors: a standard product search, a catalog and a campaign based product search
- Sales orders integrate with the product proposal strategies of SAP CRM Marketing like cross, up/down selling and Real Time Offer Management

CRM Sales Order



Interaction Center SAP

John Taylor
Media Store

Accept Reject Hold Retrieve Hang Up Transfer Warm Transfer Consult Conference Toggle End Dial Pad Ready Not Ready

Telesales* Back

Details Item 50: Item 50 was assigned to contract 5004002, item 10 1 Message

Items Transaction History

| Item | Product ID | Product Description | Confi... | Qua... | Available | Requested Date | Delive... | Amount | Unit | Net Price | Total |
|------|------------|--------------------------|----------|--------|-----------|----------------|-----------|--------|------|-----------|--------------|
| 10 | HT-1010 | Notebook Professional 15 | | 1 | | 06.11.2007 | | 0,00 | USD | 1.999,00 | 1.999,00 USD |
| 20 | HT-1111 | Notebook Lock | | 2 | | 06.11.2007 | | 0,00 | USD | 6,90 | 13,80 USD |
| 30 | HT-1060 | Cordless Mouse | | 3 | | 06.11.2007 | | 0,00 | USD | 9,00 | 27,00 USD |
| 40 | HT-1070 | Proctra X | | 2 | | 06.11.2007 | | 0,00 | USD | 18,90 | 37,80 USD |
| 50 | HT-1020 | Easy Hand III | | 1 | | 06.11.2007 | | 0,00 | USD | 129,00 | 129,00 USD |
| 60 | HT-1010 | Notebook Professional 15 | | 2 | | 06.11.2007 | | 0,00 | USD | 1.999,00 | 3.998,00 USD |
| 70 | HT-1090 | Surround Sound | | 2 | | 06.11.2007 | | 0,00 | | 39,00 | 78,00 USD |
| | | | | 0 | | | | | | 0,00 | |

Telesales

General Change History Header Details Header Pricing Payment Form

| | | | | | | |
|-------------|----------------------|--------------|----------------------|--------------------------|----------------------|----------------------|
| Description | <input type="text"/> | Ext. Ref. | <input type="text"/> | Payment Form / Card Type | <input type="text"/> | <input type="text"/> |
| Gross Value | 6.282,60 | Currency | USD | Card Holder | <input type="text"/> | |
| Net Value | 6.282,60 | Status | Open | Card No. / CVV. | <input type="text"/> | <input type="text"/> |
| Tax Amount | 0,00 | Net Weight | 19,090 | Expiry Date (MM/YYYY) | <input type="text"/> | <input type="text"/> |
| Ship. Costs | 0,00 | Cond. Amount | <input type="text"/> | Max. Amount / Auth. No. | <input type="text"/> | <input type="text"/> |
| Ship. Cond. | Standard | Cond. Unit | <input type="text"/> | Authorization Result | <input type="text"/> | |

Dienstag, 6. November 2007 9:11

Complaint Handling

- Complaint handling allows agents to trigger a replacement delivery free of charge or a credit memo in case a customer reports a quality issue related to a sold product

Call List Execution

- Call lists originating from marketing campaigns and other sources can be executed by agents in the interaction center

Interactive Scripting and Lead Management

- Interactive scripts support agents in the communication process by providing question and answer recommendations
- Data from scripts and surveys can be passed to customer master data or to marketing leads in the background. In parallel an interaction center screen enables agents to directly maintain and qualify leads

Lead Management



Interaction Center SAP

B.A. Chris1 Robertson1 Business partner found .
Park Lane Financials Business partner found .

Accept Reject Hold Retrieve Hang Up Transfer Warm Transfer Consult Conference Toggle End Dial Pad Ready Not Ready

Lead* Back 3 Messages

Account Identification

Account Fact Sheet

Account Overview

Interaction Record

Interaction History

Leads

Opportunity

Sales Orders

ERP Sales Order

Sales Tickets

Complaints

Service Orders

Service Tickets

Case

Knowledge Search

Document Search

Campaigns

Script

Fax

Letter

Index

Inbox

Overview | Business Context

Change History Transaction History

Description:

Start / End Date: 02.11.2007

Status / Reason: Open

Qualification Level:

Questionnaire Level:

Priority / Origin:

Campaign:

Questionnaire | Notes

Questionnaire ID: LEAD QUESTIONNAIRE

Version:

Lead Questionnaire

Questions

Which products are you interested in?

Notebooks

PCs

Handhelds

How many employees do you have in your company?

< 50 employees

How many units do you plan to buy?

< 10 units

10 - 25 units

26 - 50 units

51 - 100 units

> 100 units

In which timeframe are you planning to buy these products?

< 3 months

Partners | Follow-Up

Sales Representative:

| Partner Function | Partner Number | Description |
|----------------------|----------------|------------------------|
| Sales Representative | BRIGHTA | Alex Bright |
| Employee Responsible | 422747 | Bettina Giese |
| Contact Person | 400011 | B.A. Chris1 Robertson1 |
| Sales Prospect | 3270 | Park Lane Financials |

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Service order management

- Allows agents to perform deep technical analysis of a reported technical problem including multi-level categorization, and assign the correct services and spare parts

Service ticket management

- Allows agents to report any service request and perform end-to-end service support within defined Service Levels

Complaint management

- Enables the agent to quickly and efficiently create complaints related to a reference document or object and fulfill the follow-on task, such as creation of credit memos or returns

Service Ticket



Interaction Center SAP

John Taylor | Business partner found .
Media Store | Time to wrap up!

Accept Reject | Hold Retrieve Hang Up Transfer Warm Transfer Consult Conference Toggle End Dial Pad | Ready Not Ready

Teleservice* Back

i Date calculation performed successfully 1 Message

Service Ticket | [Change History](#) | [Transaction History](#) | [Categorization](#) | [Actions](#) | [Follow-Up](#)

Description:
 Priority/Status:
 Component:
 Product ID:
 Object: [Detail](#)

Category 1:
 Category 2:
 Category 3:
 Category 4:

Notes | [Partners](#) | [Business Context](#)

Type:

SLA Info | [Time Recording](#)

Contract:
 Response Profile:
 Service Profile:
 Timezone:

| Appointment Name | Date | Time |
|----------------------|------------|----------|
| Notification Receipt | 07.11.2007 | 13:11:35 |
| Requested Start | 07.11.2007 | 00:00 |
| Requested End | 10.11.2007 | 00:00 |
| First Response By | 07.11.2007 | 17:11:35 |
| ToDo By | 08.11.2007 | 09:11:35 |

◀ Back 1 2 3 Forward ▶

Case management

- Allows agent to easily cluster reported issues in tickets and orders (of the same issue type), within one case. The agent can assign a ticket or order to an existing case or create a new case

Product Registration

- Allows agents to quickly search and maintain Installed Bases
- Allows agents to quickly search, maintain or create IObjects

Knowledge search

- Allows agent to quickly identify solutions to known problems, and helps agents to resolve service issues faster, often on the first call

Installed Base Overview



Installed Base: 579, High Com installation Back

New Save Cancel Fact Sheet Print

Installed Base Hierarchy

Description

- High Com installation
 - IT Landscape Denver 01
 - Notebook Basic 17
 - Easy Pixel
 - Notebook Professional 15
 - Notebook Professional 17

General Data Edit Status

IBase ID: 579 External ID: IB45345

IBase Category: Installed Base Status: Created

Description: High Com installation

Name and Address Back to Top

Parties Involved Print Edit Back to Top

Insert

| Function | ID | Name | Address | Main Partner |
|---------------|------|----------|---------------------------------|-------------------------------------|
| Sold-To Party | 3274 | High Com | Lincoln Ave 5002 \ 02101 BOSTON | <input checked="" type="checkbox"/> |

Product Components Print Edit Back to Top

New

| Item | Sort String | Product ID | Product | Quantity | Unit | Structure ... |
|------|-------------|------------|--------------------------|----------|------|--------------------------|
| | | HT-1010 | Notebook Professional 15 | 0,000 | | <input type="checkbox"/> |
| | | HT-1011 | Notebook Professional 17 | 0,000 | | <input type="checkbox"/> |

Text Components Print Edit Back to Top

New

| Item | Sort String | Text |
|-----------------|-------------|------|
| No result found | | |

Object Components Print Edit Back to Top

New Create New Object

| Item | Sort String | Object ID | Object Family | Object | Structure ... |
|-----------------|-------------|-----------|---------------|--------|---------------|
| No result found | | | | | |

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SAP CRM Interaction Center provides a collection of applications that drive both operational and management excellence for interaction center managers:

Manager dashboard

- Monitors call center volume and agent activity
- Ensures coverage is adequate
- Sets personalized thresholds and alerts managers if they are crossed

Analytics and monitoring

- Ensures service levels are being met or exceeded
- Blends communication and business within reporting and monitoring
- Identifies sudden trends and react appropriately

Management tools and applications

- Provides business user access to administrative functionality
- Provides agent guidance
- Provides central modeling tool for routing business documents

SAP Interaction Center Management



Monitoring and managing

- Manager dashboard
- Call lists
- Broadcast messaging

Knowledge management

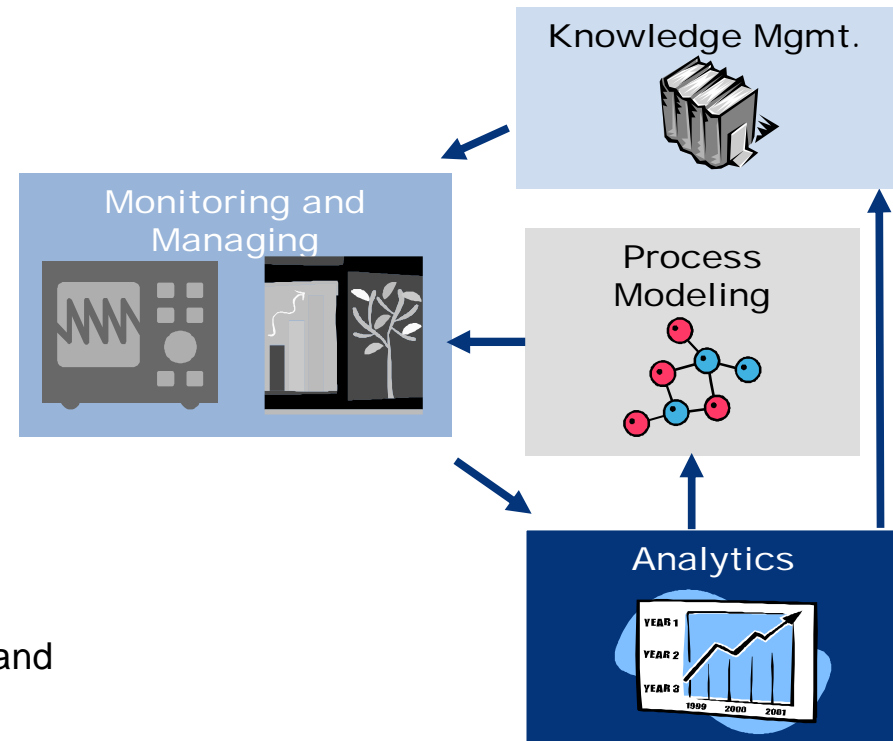
- Creates solutions to problems
- Builds schemas for multilevel categorization
- Creates standard responses for incoming e-mail

Process modeling

- Interactive scripting
- Business rules for e-mail response management and service ticket routing

Reports

- Including key interaction statistics such as Call volume, SLA compliance, average handling time, and abandonment rates
- Campaign success rates and service contract profitability
- Blended analytics with or without CTI allowing drilldown into statistics by category



E-Mail Status provides a daily snapshot of e-mail volume and related statistics by group and agent.

SAP CRM Personalize | Help Center | System News | Log Off

Saved Searches: 0810 Go Edit

E-Mail Status Back

Status by Organization

| Group | Today's E-Mails | In Queue | In Process | Responded | Auto Responded | Auto Deleted | Deleted | Bounced |
|-------------------------|-----------------|----------|------------|-----------|----------------|--------------|---------|---------|
| Unassigned | 0 | 85 | 0 | 0 | 0 | 0 | 0 | 0 |
| PC4U Global | 0 | 4 | 0 | 0 | 0 | 0 | 0 | 0 |
| Backoffice Agents | 0 | 8 | 0 | 0 | 0 | 0 | 0 | 0 |
| CRM Tester Organization | 0 | 137 | 5 | 0 | 0 | 0 | 0 | 0 |
| Test11 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 |
| CRM Interaction Center | 0 | 1 | 1 | 0 | 0 | 0 | 0 | 0 |
| New organizational unit | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 |
| test_29.3 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 |
| New organizational unit | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 0 |

Status by Incoming E-Mail Address

| Group | Today's E-Mails | In Queue | In Process | Responded | Auto Responded | Auto Deleted | Deleted | Bounced |
|---------------------------|-----------------|----------|------------|-----------|----------------|--------------|---------|---------|
| erms@506.q8d.r3.sap-ag.de | 0 | 200 | 7 | 0 | 0 | 0 | 0 | 0 |
| erms@600.faz.r3.sap-ag.de | 0 | 2 | 0 | 0 | 0 | 0 | 0 | 0 |
| erms@600.frz.r3.sap-ag.de | 0 | 36 | 0 | 0 | 0 | 0 | 0 | 0 |

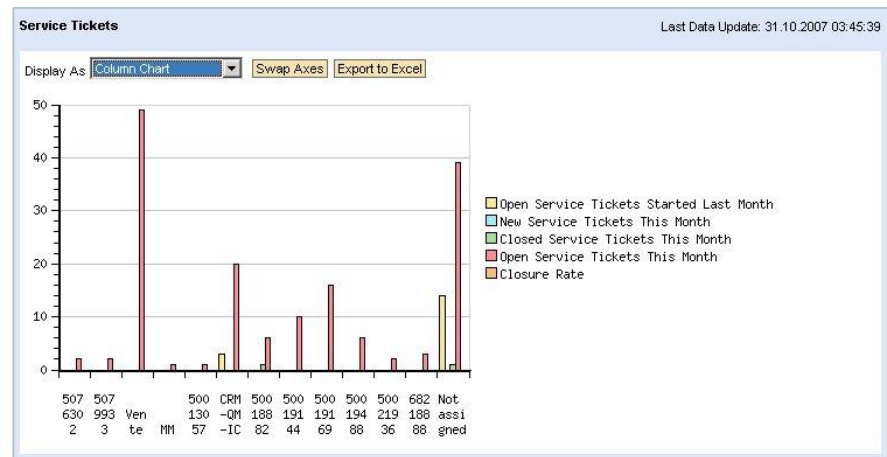
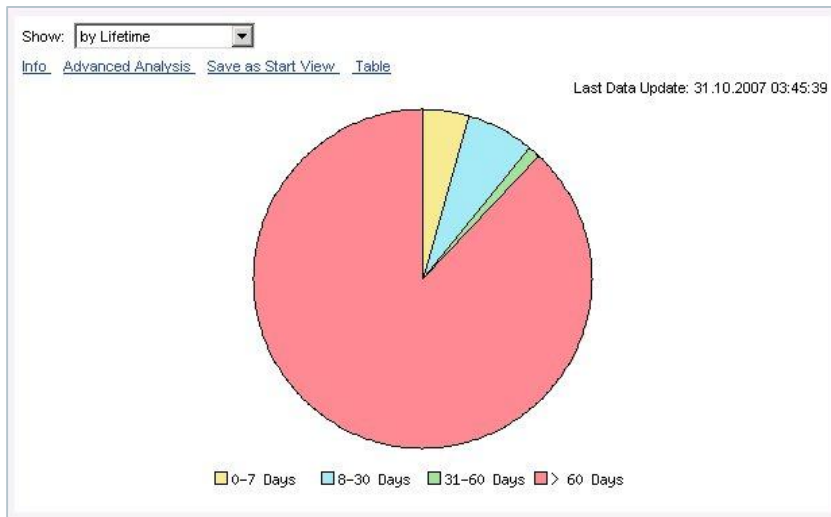
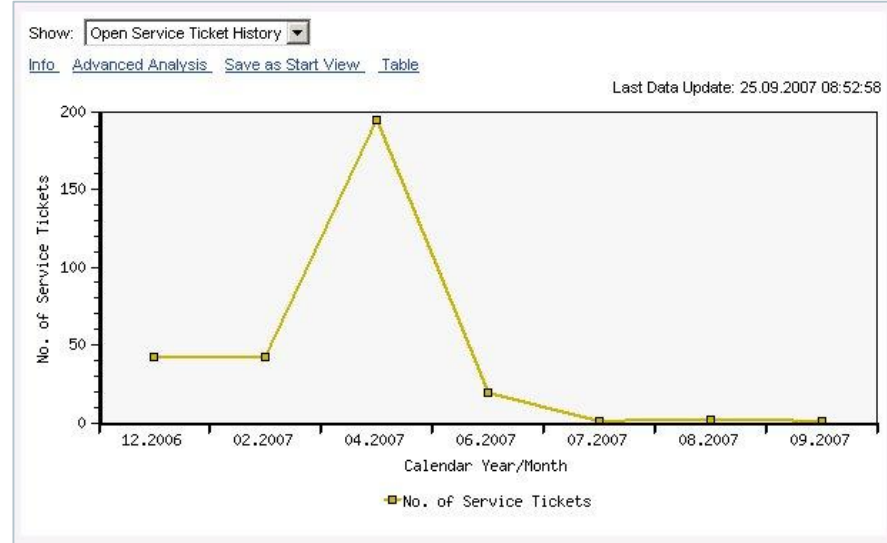
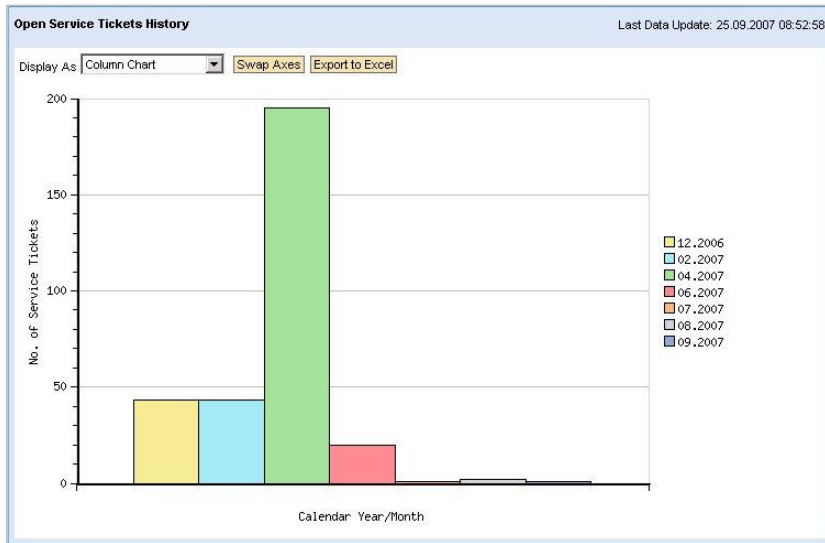
Escalations by Organization

| Group | Escalated E-Mails | Average Violation(Hours) | Avg.Rule Violation(Hours) | Avg. SLA Violation(Hours) | % Escalated in Queue |
|-------------------------|-------------------|--------------------------|---------------------------|---------------------------|----------------------|
| Unassigned | 35 | 2,543,69 | 2,566,40 | 0,00 | 35,35 |
| CRM Tester Organization | 143 | 1,187,44 | 956,80 | 0,00 | 91,67 |
| Test11 | 1 | 2,597,80 | 0,00 | 0,00 | 100,00 |
| CRM Interaction Center | 2 | 949,50 | 0,00 | 0,00 | 100,00 |
| New organizational unit | 2 | 1,743,12 | 0,00 | 0,00 | 100,00 |
| test_29.3 | 1 | 1,351,39 | 0,00 | 0,00 | 100,00 |
| New organizational unit | 1 | 849,70 | 0,00 | 0,00 | 100,00 |

Escalations by Incoming E-Mail Address

| Group | Escalated E-Mails | Average Violation(Hours) | Avg.Rule Violation(Hours) | Avg. SLA Violation(Hours) | % Escalated in Queue |
|---------------------------|-------------------|--------------------------|---------------------------|---------------------------|----------------------|
| erms@506.q8d.r3.sap-ag.de | 185 | 1,445,05 | 1,761,60 | 0,00 | 78,39 |

Example of Process-Based Analytics



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Rule-Based Handling of Incoming E-Mails and Web Forms

- Rule-based routing
- Auto-acknowledge / auto-respond
- Auto-prepare (one-click response)
- Escalation notification
- Automatically create interaction record / service ticket
- Link incoming emails to existing service ticket
- Automatic deletion (spam, out-of-office, and so on)

Administration, Simulation, Reporting & Analytics

- Mass re-assignment of e-mails
- Simulation and logging
- Real-time monitoring
- Historic analytics

ERMS - Send Solution



SAP
Interaction Center

John Taylor
Media Store

Business partner found .
Navigate

Mail Outbound
0:44 / 0:44 E-mail 1

Accept Reject Transfer End Dial Pad

Ready Not Ready

E-Mail

- Account Identification
- Account Fact Sheet
- Account Overview
- Interaction Record
- Interaction History
- Leads
- Opportunity
- Sales Orders
- ERP Sales Order
- Sales Tickets
- Complaints
- Service Orders
- Service Tickets
- Case
- Knowledge Search
- Document Search
- Campaigns
- Script
- Fax
- Letter
- Index
- Inbox

E-Mail (New)

Subject:

Std Response:

Solution Solution : please have a look in install guideID : 5000000000041: please have a look in install guide<_|>Attributes : Solution Description, Hardware, SERVICE, ReleasedOTR(LinkedDocuments)OTR: [install guide](#)

Problem ID : 000000000044: DVD drive makes noises<_|>Attributes : Quality Management, Optical Problem, SERVICE, Released

E-Mail Header

From:

To:

Cc:

Bcc:

Date/Time:

Attachments

| Type | File name |
|-----------------|-----------|
| No result found | |

Interaction Record

Description:

Priority/Status:

Reason:

Enable Automation of Interaction Center Service Processes

- Support multi-level categorization of service transactions
- Enable solution auto-suggest for service issues
- Auto-complete service ticket via templates (e.g., for reoccurring issues like password resets)
- Escalate/dispatch service transactions via business rules

Service Ticket With Multi-Level Categorization, Auto-Suggest Solutions & Auto Complete



Interaction Center SAP

John Taylor 4 Suggested Solutions Media Store

Accept Reject Hold Retrieve Hang Up Transfer Warm Transfer Consult Conference Toggle End Dial Pad Ready Not Ready

Teleservice* Back

Date calculation performed successfully 1 Message

Service Ticket Change History Transaction History Categorization Actions Follow-Up

Description: Printer is not available

Priority/Status: Very high Open

Component:

Product ID:

Object: 991 Detail

Escalate Teleservice

Categorization

Category 1: Printer

Category 2: Installation

Category 3: Connection

Category 4: Auto Complete

Notes Partners Business Context

Type: Problem Description English

Import Scratch Pad

SLA Info Time Recording

Contract: 5002143 Hardware Contract

Response Profile: 4TO24 4 to 24 hours response tim

Service Profile: 6X12 Mo - Sa 6 - 18 h

Timezone: System (CET)

| Appointment Name | Date | Time |
|----------------------|------------|----------|
| Notification Receipt | 07.11.2007 | 13:11:35 |
| Requested Start | 07.11.2007 | 00:00 |
| Requested End | 10.11.2007 | 00:00 |
| First Response By | 07.11.2007 | 17:11:35 |
| ToDo By | 08.11.2007 | 09:11:35 |

◀ Back 1 2 3 Forward ▶

Service Ticket Escalation via Rule Policies



Interaction Center SAP

John Taylor
Media Store 3 Suggested Solutions

Accept Reject Transfer End Dial Pad Ready Not Ready

Teleservice* Back

Date calculation performed successfully 1 Message

Service Ticket Change History Transaction History Categorization Actions Follow-Up

Description: Hard disk seems to be broken

Priority/Status: Very high Open

Component: 667 Detail

Product ID: HT-1010

Object:

Category 1: Computers

Category 2: Hardware Issues

Category 3:

Category 4: Auto Complete

Escalate Teleservice

Notes **Partners** Business Context

Employee Responsible: Add

| Partner Function | Partner Number | Description |
|------------------------|----------------|--------------------------|
| Sold-To Party | 3271 | Media Store |
| Bill-To Party | 300692 | XYZ Healthcare Center |
| Payer | 3271 | Media Store |
| Contact Person | 400012 | Mr. and Mrs. John Taylor |
| Ship-To Party/Servi... | 3271 | Media Store |

SLA Info Time Recording

Contract: 5002143 Hardware Contract

Response Profile: 4TO24 4 to 24 hours response time

Service Profile: 6X12 Mo - Sa 6 - 18 h

Timezone: System (CET)

| Appointment Name | Date | Time |
|----------------------|------------|----------|
| Notification Receipt | 07.11.2007 | 13:42:57 |
| Requested Start | 07.11.2007 | 00:00 |
| Requested End | 10.11.2007 | 00:00 |
| First Response By | 07.11.2007 | 17:42:57 |
| ToDo By | 08.11.2007 | 09:42:57 |

Intent-Driven Interaction (Rule-Based Agent Guidance)



Ensure customer interactions are processed according to corporate standards via rule-based alerts, scripts, navigation, and other actions based on flexible IC events

- IC Events – Define own IC events based on user interface actions
- Rule Policy – Use IC events and other business information to trigger alerts, launch scripts, add items to wrap-up list, or navigate
- Alert Editor – Create alerts with text variables and navigation

Rule Policy: Create Rule to Trigger Alert



Rule Policy: ZZICSM_DEFAULT (E-Mail Response Management System) Back

Save | Edit | Overview Print

Policy

| Name | Description |
|--------------------|------------------------|
| ZZICSM_DEFAULT | |
| Active | |
| Released Rules | |
| Auto Acknowledgeme | Auto Acknowledgemen... |
| Auto Acknowledge | Auto Acknowledgement |
| Auto Route | Auto Route folder |
| Auto route | Auto route |

Rule Details

Name: Auto Acknowledgement

Description: Auto Acknowledgement

Created On: 12.04.2007 Changed On: 12.04.2007

Created At: 16:35 Changed At: 16:35

Created By: Changed By:

Conditions Back to Top

| Match | Attribute | Operator | Value | Description | Case Sensit... |
|-------|---------------------------|----------|--------------|-------------|-------------------------------------|
| If | E-Mail Original Recipient | Contains | ERMS@800.... | | <input checked="" type="checkbox"/> |

Actions Back to Top

| Actions | Name | Value | Description |
|---------------------------|---------------------------|----------------|----------------|
| Actions/Parameters | | | |
| Send Auto Acknowledgement | | | |
| | Mail Form | ZZICSM_DEFAULT | IC SM Auto Ack |
| | Outgoing E-Mail Address | | |
| | Create Interaction Record | No | |
| | Create Service Order | No | |

Preview Back to Top

If
E-Mail Original Recipient Contains
Then
Send Auto Acknowledgement (Mail Form = IC SM Auto Ack; Outgoing E-Mail Address =
Create Interaction Record = No; Create Service Order = No)

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 - 2.7 IC Multi-Channel - Details**
3. Positioning and Benefits

Communication Channels

- Telephony
 - Screen Pop and Contact-Attached Data
 - Soft-phone controls
 - Automatic Number Identification (ANI)
 - Dialed Number Identification Service (DNIS)
 - Integration with Interactive Voice Response (IVR) units, and Voice Portals
 - Integration with automated dialers for Predictive, Progressive and Preview dialing
- Email, Fax and Letter
 - Screen pop and Contact-Attached Data
 - Email Response Management (ERMS)
 - Agent inbox
 - Integration with workflow for routing and escalation
- Web
 - Text chat, Voice over IP, Call-me-back request
 - Integration with E-service / Web self-services



Analytics & Monitoring

- Statistics Interface
- Interaction Statistics
- Blended Analytics
- Standard content for communication and business based reporting
- IC Manager Dashboard

Email Response Management System (ERMS)

- Rule based handling of incoming e-mails and webforms
- Automatic routing
- Automatic acknowledgement / response
- Automatic preparation of response



Multi-channel Integration in IC WebClient



Telephony Integration

Email Integration

Interaction Center

Jeff Daniels
High Com

Phone Inbound
Connected 0:14 / 0:14 Phone 1

Accept Reject Hang Up End

Ready Not Ready

Identify Account (ID: 3274)

Account

| | | | | |
|----------------------|------------------|----------------|----------------|--------|
| Version | Standard | More Fields | Installed Base | Object |
| First Name/Last Name | Jeff Daniels | Component | | |
| Function | 11 Buyer | Product ID | | |
| Department | 0002 Purchasing | Identification | | |
| Account | High Com | Search | Clear | |
| Street/House Number | Lincoln Ave 5000 | | | |

Interaction Center

Mail Inbound
Accepted 0:19 / 0:19 E-mail 1

Accept Reject Transfer End Dial Pad

Ready Not Ready

Account Identification

Account

| | | | | |
|----------------------|--------------------------|-------------|----------------|--------|
| Version | Standard | More Fields | Installed Base | Object |
| First Name/Last Name | Jeff Daniels | Component | | |
| Function | 11 Buyer | Product ID | | |
| Department | 0002 Purchasing | Search | Clear | |
| Account | High Com | | | |
| Street/House Number | Lincoln Ave 5000 | | | |
| City | BOSTON | | | |
| Postal Code/Region | 02101 MA Massachusetts | | | |
| Country | US USA | | | |
| Contact Info For | Contact Person | | | |
| Telephone/Extension | 312-324 9111 | | | |
| Fax/Extension | 312-324 9202 | | | |
| E-Mail Address | jeff.daniels@highcom.com | | | |

Confirm

Agent Inbox – Inbound E-Mail Handling



Interaction Center SAP

Accept
 Reject
 Transfer
 End
 Dial Pad

 Ready
 Not Ready

Inbox Back

Inbox Search

Quick Search

Category
 Assigned To
 Priority

Status
 Description
 Account

Time Period
 Date Type
 From/To

Object ID
 Sort By
 Then Sort By

Result List

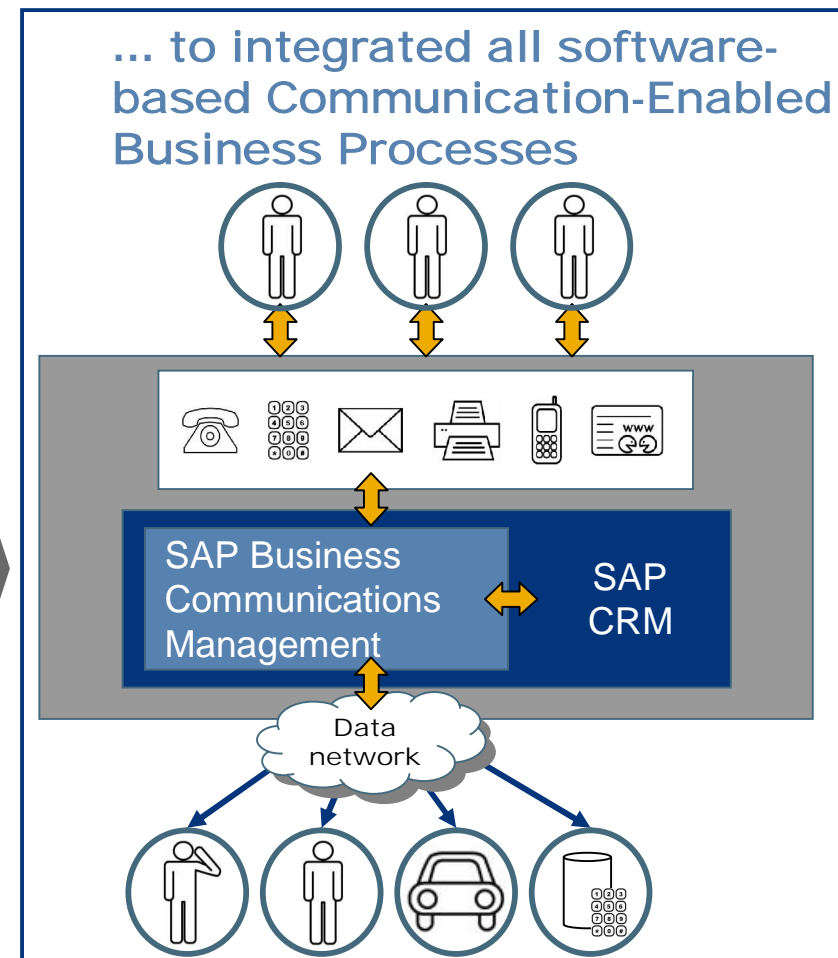
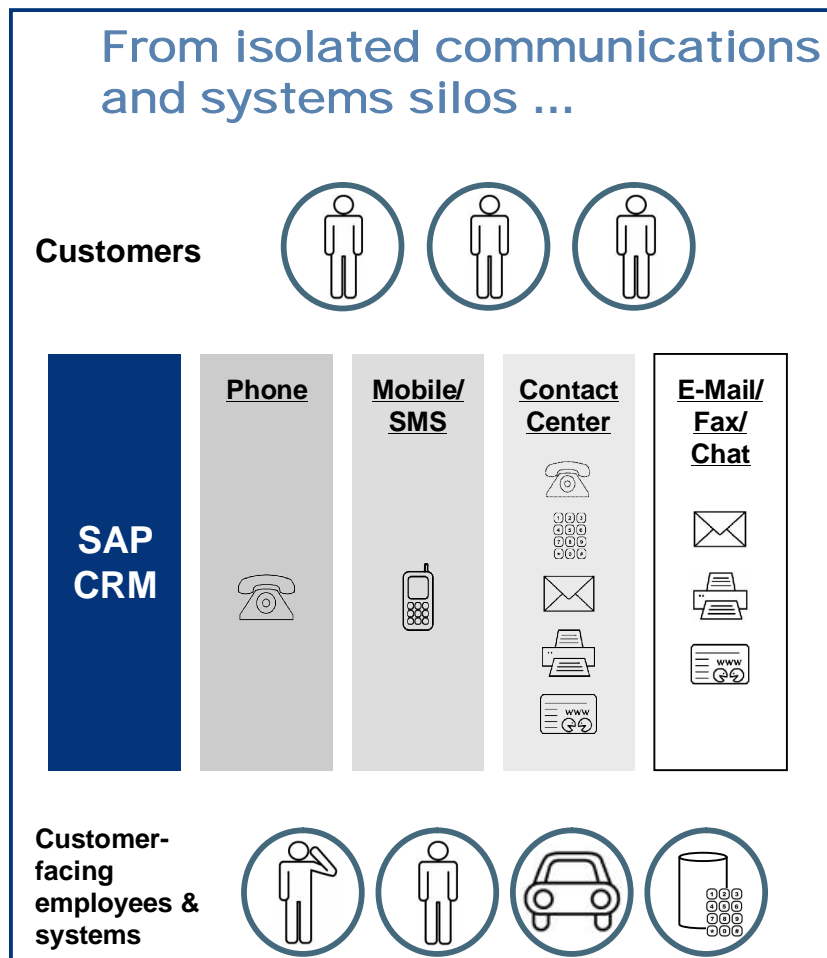
| Node | Due | Category | Description | Priority | Status | Resp. Employee | Creation Date |
|------|----------------|----------|----------------------------------------|----------|------------|----------------|---------------|
| ▶ | 22.10.07 23:51 | E-Mail | 'Cannot be sent: aaa' rec. from SAP... | Medium | In Process | CRM Support | 22.10.2007 |
| ▶ | 17.10.07 05:45 | E-Mail | 'WEB FORM :{sender:[rashmi.c@sa... | Medium | In Process | Rashmi C | 17.10.2007 |
| ▶ | 16.10.07 20:18 | E-Mail | 'WEB FORM :{sender:[ananda.kuma... | Medium | In Process | CRM Support | 16.10.2007 |
| ▶ | 16.10.07 20:11 | E-Mail | 'Cannot be sent: WEB FORM :{send... | Medium | Open | | 16.10.2007 |
| ▶ | 16.10.07 20:09 | E-Mail | 'WEB FORM :{sender:[ananda.kuma... | Medium | Open | | 16.10.2007 |
| ▶ | 16.10.07 20:01 | E-Mail | 'Test gak' rec. from ananda.kumar.g... | Medium | Open | | 16.10.2007 |
| ▶ | ✓ | E-Mail | 'uuou' rec. from lokesh.manikantha.... | Medium | Completed | CRM Support | 13.10.2007 |
| ▶ | 12.10.07 12:38 | E-Mail | 'qqqqqqqqqq' rec. from lokesh.mani... | Medium | Open | | 12.10.2007 |
| ▶ | 11.10.07 11:00 | E-Mail | 'damage' rec. from rashmi.c@sap.c... | Medium | In Process | Rashmi C | 11.10.2007 |
| ▶ | ✓ | E-Mail | 'Status' rec. from rashmi.c@sap.co... | Medium | Completed | Rashmi C | 09.10.2007 |

Forward To

Enable Communication-Enabled Business Processes with SAP Business Communications Management



- Manage distributed cross-functional resources
- Leverage corporate knowledge
- Provide a seamless customer experience across channels



Improve Customer Interaction Handling by an Integrated Agent User Interface



Accelerate, simplify and improve quality of business interactions through BCM softphone integrated with SAP CRM Interaction Center



BCM softphone functionality integrated with Interaction Center toolbar

BCM routes both voice calls and push emails to Interaction Center agents

Interaction Center

Jeff Daniels
High Com

Phone Inbound
Connected 0:14 / 0:14 +13123242575
Phone 1

Ready Not Ready

Identify Account (ID: 3274)

Account Identification

Account

Version Standard

First Name/Last Name Jeff Daniels

Function 11 Buyer

Department 0002 Purchasing

Account High Com

Installed Base Object

Component

Product ID

Identification

Search Clear

Interaction Center

Mail Inbound
Accepted 0:19 / 0:19 jeff.daniels@highcom.com
E-mail 1

Ready Not Ready

Account

Version Standard

First Name/Last Name Jeff Daniels

Function 11 Buyer

Department 0002 Purchasing

Account High Com

Street/House Number Lincoln Ave 5000

City BOSTON

Postal Code/Region 02101 MA Massachusetts

Country US USA

Contact Info For Contact Person

Telephone/Extension 312-324 9111

Fax/Extension 312-324 9202

E-Mail Address jeff.daniels@highcom.com

Confirm Related

Browser Based SAP BCM Softphone



Browser based BCM softphone offers comprehensive real time queue management and monitoring functionality for agents

Personal presence management

Active customer interactions info

Real time queue view including login status management

Special call handling tools: e.g. recording, conference, callback, audio settings and quick dialing keys

Call handling tools: answer, hold, transfer, consult, hang-up

Link to Message Panel

| Queue Name | Count | Time | 1 | 2 |
|----------------|-------|-------|---|---|
| CS-demo 900 | 3 | 00:45 | 1 | 1 |
| 900 Call-back | 1 | 04:00 | 0 | 0 |
| SB-demo 450 | 1 | 00:22 | 0 | 0 |
| FB-demo 451 | 0 | 00:00 | 1 | 1 |
| Email demo1 | 2 | 05:14 | 0 | 0 |
| SMS-demo 18303 | 1 | 03:20 | 0 | 0 |
| FAX-demo1 | 1 | 04:32 | 0 | 0 |
| Email-demo2 | 0 | 00:00 | 0 | 0 |

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SAP CRM Interaction Center drives both operational and management excellence to make every **interaction count**

It does this by providing a **platform** that supports multi-channel customer interactions in the domain of telesales, telemarketing and customer service.

Manager Desktop



Agent Front End



Infrastructure & Framework



Summary: Benefits of the Interaction Center



Better customer relationships

- The entire customer interaction cycle is captured and tracked, starting with initial engagement and ending with fulfilment
- Obtain insights into customer behaviour and tailor offerings to match their needs
- Gain competitive advantage by increased loyalty and retention

Unique integration capabilities

- Select and flexibly deploy processes that suit your business needs
- Integrate with existing SAP and non-SAP enterprise functions, including supply chain management, product life cycle management, financial management, and HR management

Do more with less

- Automated and streamlined processes reduce costs
- Revenue is increased through efficient customer interactions and enhanced cross-selling and up-selling opportunities



- SAP CRM - Roll-Out Map
<https://portal.wdf.sap.corp/go/crm-rollout-map>
- SAP CRM - Ramp-Up Knowledge Transfer (RKT)
<http://service.sap.com/rkt-crm>
- SAP CRM – Demo Portal
<http://crmportal.wdf.sap.corp:1080>
- SAP CRM – WiKi
<https://wiki.wdf.sap.corp/display/SAPCRMHub/Home>
- SAP CRM - Help Portal
<http://help.sap.com/crm>
- SAP Public Web
<http://www.sap.com/solutions/business-suite/crm/featuresfunctions/index.epx>



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