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WHITE PAPER

Customer Relationship Management

We develop CRM processes and strategies, redesigning relationships between companies and customers.

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00 Summary

01

Trends, challenges and opportunities

Customer Relationship Management has been around for two decades now, and we have witnessed the appearance of increasingly high-performance and comprehensive software designed to support companies' relationship processes. However, **CRM is still challenging** both for companies that have already introduced it as a technology platform and for those that are considering implementing it.

CRM is not just a matter of focusing on technology.

You need to pave the way before and after technical developments to enable the **strategic, cultural and organisational transformation** that the introduction of software can bring about at an operational level, leading to a progressive improvement of the **Customer Experience**.

Knowing how to manage your client relationships in a traditional way is no longer enough: the digital revolution, which started many years ago, has been accelerated and amplified by the effects of the pandemic, transforming the brand-client relationship.

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Engineering ©

Companies need to position themselves to **offer the same shopping experience across both physical and digital channels**, engaging in an **omnichannel relationship** with their customers.

Technology, strategy and processes must work together to streamline and optimise internal cooperation between staff, and external relationships with customers with increasingly high expectations in terms of experience.

CRM is vital to this transformation.

Data and processes: the two cornerstones for successful CRM

The acronym CRM (Customer Relationship Management) itself suggests its main objective: to manage the brand's relationship with existing and potential customers.

To achieve this goal with the support of technology, the two main assets upon which everything centres are **data and processes**.

Without data there is no CRM, and without clear and defined processes software cannot perform efficiently. The following **relational processes** can be supplemented and supported by CRM systems:

- **Sales**: to manage the sales process from lead management to purchase and to support the offer lifecycle, from quote creation to order conversion

- **Marketing**: for segmenting and targeting the Customer Base (leads, customers), creating and planning marketing campaigns, managing multi-channel initiatives, integrating CRM with marketing automation tools

- **Customer care and after-sales**: for contact management, creation and tracking of customer-related requests and cases, planning and management of field service technical interventions

- **e-Commerce**: the integration between e-Commerce platforms and CRM software optimises online sales through greater personalisation and automation of the shopper experience.

It is essential that the overall CRM architecture aims to integrate all relational processes: each process contributes to the generation of data and information.

A **360° customer view** requires the system to capture every interaction between the company and the customer and to hold information that allows customer knowledge to be enriched with strategic data generated by the other information systems used by the various company areas: typically the management system, Contact Management, digital channels, marketing and e-Commerce platforms.

But the real challenge is making strategic use of this data.

This was the focus of the **8th CRM Observatory**, the most comprehensive research in Italy on Customer Relationship Management, which ENG has actively supported since 2020. The Observatory sets out to analyse how CRM is used by Italian companies both in technological terms and as a customer-centric and data-driven business philosophy.

Trends, challenges and opportunities

Dati and analytics: the driving force behind CRM

The 2023 edition of the Observatory explored the use of Data and Analytics, the real driving force behind CRM as the wealth of information it contains, if used and analysed, can **steer management decisions and shape the business**.

> An increasing number of organizations are moving from a sales model based on experience and intuition to a data-driven model.

The turning point, which allows CRM to be perceived as a tool that can add tangible value to the company, is **when data starts "talking"**, i.e. providing users and management with metrics that allow them to monitor their activities and business, identify trends, risks and opportunities, and make decisions based on real data and not on hunches or their own experience.

What were the findings of the eighth edition of the Observatory?

The percentage of companies analysing their customer data regularly is stable compared to previous years, at 54% (figure 1).

There is also no change in the percentage of those analysing their data occasionally (34%). There was however a slight decrease in the number of organisations not analysing their data (-2%).

The steady nature of this insight, which is positive in that it shows that the majority of research participants are
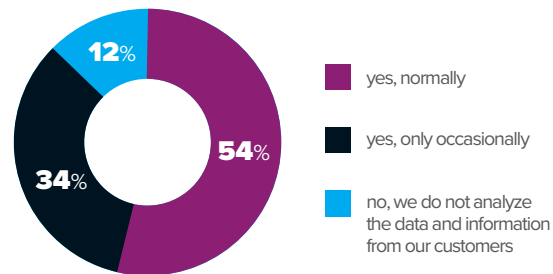
analysing their data, is, however, at odds with market trends that indicate that being equipped with advanced data analysis technologies, such as Artificial Intelligence, is a priority for management.

We would therefore have expected significant growth in the number of companies analysing their customer data, not a steady position.

Another interesting insight revealed by the Observatory relates to the main technologies used to analyse customer data. In the age of Big Data and Artificial Intelligence, you would think companies would be using advanced technologies.

Instead, the most widely used tool for analysing their Customer Base was actually **Excel** for **76%** of the respondents (fig. 2). This was followed by **CRM dashboards (70%)** and **Business Intelligence software (65%)**. Data Mining and Artificial Intelligence software are trailing far behind. If we look instead at insights into the technologies companies are planning to introduce (Fig. 3), we see a striking dichotomy: **Artificial Intelligence and Data Mining software are the top two Advanced Analytics tools that company management would like to introduce.**

- yes, normally
- yes, only occasionally
- no, we do not analyze the data and information from our customers

Fig. 1 / Customer data analysis

Fig. 2 / Technologies used in customer analysis

76%	Excel / access
70%	Dashboard nel CRM
65%	Business Intelligence
38%	Reporting sulla Cust. Data Platf.
30%	Software Advanced Analytics
18%	Software di data mining
18%	Artificial Intelligence

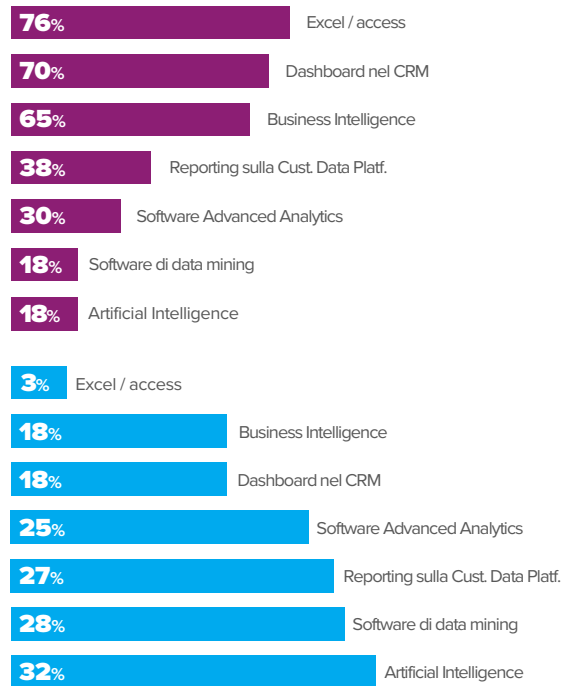|	
3%	Excel / access
18%	Business Intelligence
18%	Dashboard nel CRM
25%	Software Advanced Analytics
27%	Reporting sulla Cust. Data Platf.
28%	Software di data mining
32%	Artificial Intelligence

Fig. 3 / Technologies being considered for use in customer analysis

This discrepancy between the tools in use (predominantly Excel) and the desired tools is in part due to a **lack of awareness** and skills and in part to the **unavailability of consolidated data** in a single information system.

"I'd love to but I can't": Excel is still the main tool used for data analysis but Management aspires to other more advanced technologies, introduces them, but struggles on the one hand with the lack of in-house skills available, which would be a mix of analytical and strategic skills, and on the other hand with the complexity of information in silos, i.e. in multiple application systems.

CRM therefore becomes a key tool to enable advanced analytics and data mining technologies to process KPIs on consolidated data.

Uptake and use of technologies

CRM is now a mature technology, with a very high level of uptake: in Italy, **69% of companies use CRM software**, a figure that has grown steadily over the years of the Observatory's monitoring but is now settling at around 70%. 14% are implementing it, 17% do not yet have CRM (Figure 4).

- **69**% yes, we have a CRM system
- **14**% we are implementing it
- **10**% no, but we are evaluating it
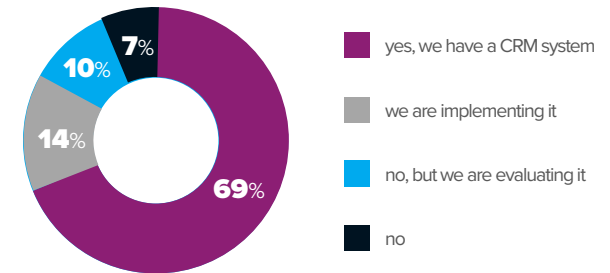- **7**% no

Fig. 4 / Diffusion of CRM

The undisputed leader in offering application solutions is **Salesforce, which dominates the market** both in terms of market share and growth rate (figure 5). In Italy, **40%** of companies claim to have chosen it as their CRM software, with a 5% increase in

Trends, challenges and opportunities

penetration compared with the previous edition of the Observatory; **17% have chosen MS Dynamics**, 11% SAP, and 10% Hubspot.

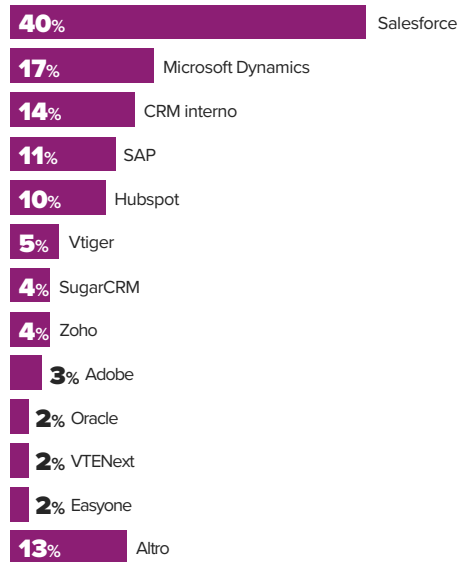On the other hand, 14% of companies have opted for a customised solution, developed in-house, a choice

that definitely goes against the trend in CRM software adoption, which in recent years has seen a predominance of market and cloud-based solutions (fig.5)

Organisational readiness

Unlike other application systems, such as systems for management, order entry and contact management etc. which are essential to functional operability, the optimisation of software and the success of CRM projects may be compromised by organisational aspects that do not allow them to reach their potential as a working tool for the business areas affected.
It is therefore important to **establish roles and responsibilities both during the design phase and once fully operational**: an area (or business resources) must be identified to ensure the software is consistent with the needs, strategies and business processes it supports. Only in this way can user adoption be facilitated.

Many projects fail to get off the ground because CRM is seen as a technology platform.

The real challenge lies not in acquiring the software but in the business' ability to focus on the customer through the use of technology.

As shown in Fig. 6, the 8th Observatory showed CRM as an established, operational business area with dedicated resources for the first time for almost 50 per cent of the respondents. This demonstrates that companies are structuring themselves to create a specific CRM division with dedicated resources. This area is increasingly being covered by Marketing, in both B2C and B2B market companies.

Fig. 5 / CRM, technological choices (2022/2023)

- 40% Salesforce
- 17% Microsoft Dynamics
- 14% CRM interno
- 11% SAP
- 10% Hubspot
- 5% Vtiger
- 4% SugarCRM
- 4% Zoho
- 3% Adobe
- 2% Oracle
- 2% VTENext
- 2% Easyone
- 13% Altro

- 46% A business area well-established, operational, with dedicated resources
- 22% An area priority area that we are developing
- 18% An area business not yet consolidated
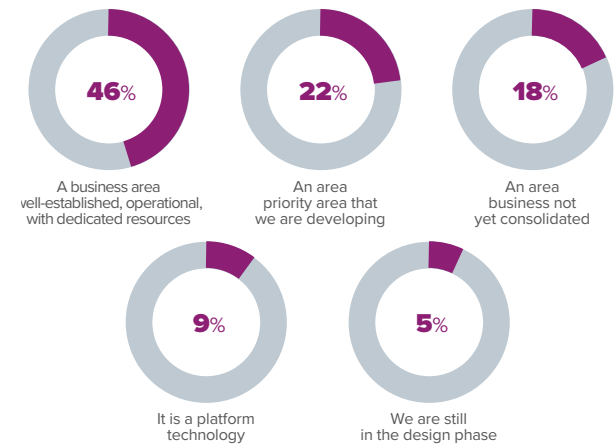- 9% It is a platform technology
- 5% We are still in the design phase

Fig. 6 / Organizational positioning of CRM

Opportunities and benefits

The introduction of a CRM does not equate merely to the addition of a technological platform within the architecture of corporate information systems: first and foremost, it represents the introduction of a business approach that involves a cultural change for a part of the organisation and its resources.

> To take advantage of the opportunities that a CRM system offers and achieve results, it is necessary to shift the company's focus from a product-orientated approach to a customer-orientated approach.

Doing this requires knowledge first and foremost. The Observatory found that the first accomplishment with CRM (fig. 7) is **having a database of customer**

and prospect details available that allows a clear and comprehensive **customer view (60%)**. It may seem rather trivial, but building the customer datahub is actually the most complex task when starting a CRM project, because the start point is usually several data silos often with missing, redundant, outdated, incorrect information resulting in fragmented customer knowledge.

For **48%** of respondents, an important benefit lies in the **analytics** that CRM allows them to monitor, facilitating a better, evolving knowledge of their customers.

Another important result is being able to **monitor relational processes** with a view to **optimising their efficiency (45%)**. However, to be able to analyse KPIs, all users need to enter data into the system, otherwise it is hard to determine comprehensive and accurate indicators. This brings us back to the issue of cultural change that underpins successful user adoption in CRM projects.

Finally, the ability to **segment and share information** between different business areas and users and **more automated customer lifecycle management** are the other important outcomes that companies with CRM report having achieved.
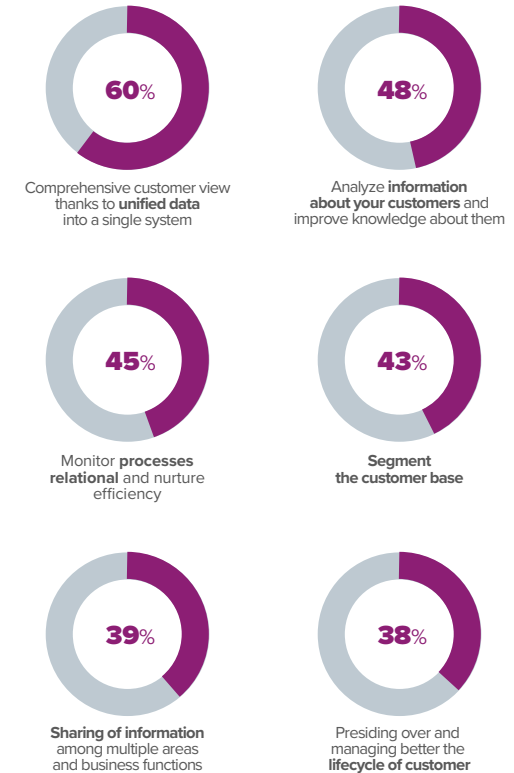

60%
Comprehensive customer view thanks to **unified data** into a single system

48%
Analyze **information about your customers** and improve knowledge about them

45%
Monitor **processes relational** and nurture efficiency

43%
Segment the customer base

39%
Sharing of information among multiple areas and business functions

38%
Presiding over and managing better the **lifecycle of customer**

Fig. 7 / Results obtained-expeted with CRM

Trends, challenges and opportunities

Challenges

CRM solutions are at a very advanced level of development. The last few years have seen a rapid evolution of the main software on the market, offering companies functionalities that in some cases surpass their actual readiness to benefit from them.

The first problem encountered by companies with CRM (fig. 8) relates to a **lack of a data-driven and customer-driven corporate culture (39%)**, which is in turn closely connected to the second problem, the **availability of in-house skills and resources (31%)**. This is hardly surprising: people with expertise in CRM are in high demand yet in short supply. CRM is an area that spans several business processes and those who manage it must be familiar with sales, marketing, customer service and after-sales processes, i.e. all the processes that need to be integrated in order to have a 360° customer view. Finding personnel with this skill set, however, is not easy.

The direct consequence of this limited availability of skills and resources is poor penetration of a data and customer-oriented corporate culture, which then has repercussions on **user adoption (20%)**, a major difficulty especially for those companies that use CRM to support

sales processes, both in terms of **commitment (16%)** and the **lack of well-defined processes (15%)**. Also among the top 3 critical issues is integration with other information systems feeding data to the **customer**

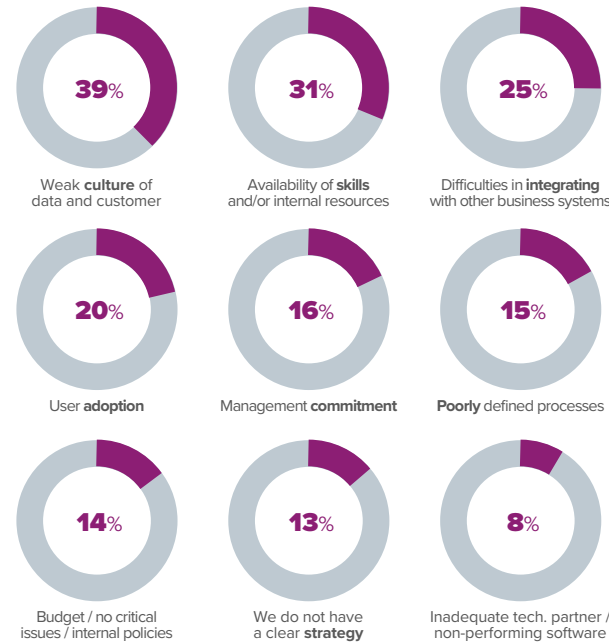|		
39%	**31**%	**25**%
Weak **culture** of data and customer	Availability of **skills** and/or internal resources	Difficulties in **integrating** with other business systems
20%	**16**%	**15**%
User **adoption**	Management **commitment**	**Poorly** defined processes
14%	**13**%	**8**%
Budget / no critical issues / internal policies	We do not have a clear **strategy**	Inadequate tech. partner / non-performing software

Fig. 8 / Main critical issues in CRM projects

base (25%). This is problematic both at a technical level - integrating company systems, especially if they are proprietary as opposed to commercial systems, is always complex - and at a strategic level, since a medium/long-term vision of the processes and information needed to achieve the goals is necessary to decide which systems should feed the CRM.

The trends: key takeaways

There are some important trends emerging from the CRM Observatory and the market, which can be summarised as follows:

Analytics: there is a strong focus by company management. Data analysis and its use in decision-making are high priorities but there are barriers in terms of skills, culture and technology that cause a mismatch between what desires and abilities. The Observatory, as well as our direct experience of the market, point to areas of weakness in both the readiness of management to use analytics for decision-making, which is medium to low, especially at middle management level, and the limited use of advanced analytics technologies due in part to the presence of data silos and in part to the lack of in-house skills.

Organisational culture: for the first time, data on the organisational positioning of CRM indicates that almost half of companies have created a well-established, operational area with dedicated resources. People make a difference: companies need adequate organisational structure if they are to develop skills and foster a CRM-oriented corporate culture capable of harnessing the potential of Analytics.

Marketing: this is the business area that is driving the growth of CRM in terms of organisation, processes and technology. CRM is predominantly the responsibility of the marketing department, with significant growth compared to previous editions of the Observatory. But it is also driving the introduction of CRM for companies that do not yet have it. Marketing Automation is also among the main technologies being adopted.

Priorities: when it comes to priorities for investment in 2023, we can see that companies are keeping their feet on the ground. The top priority is indeed CRM, followed by Marketing Automation and Digital Transformation. It is evident that a plan needs to be put together combining both strategy and technology, because both of these underpin these three priorities. This plan is instrumental in improving the Customer Experience,

developing an omnichannel approach and enabling the use of Analytics.

Artificial Intelligence ranks as the lowest priority, not because it is seen as irrelevant by management, but because the ground must first be prepared to be able to harness its full potential.

CRM is consequently the key tool for breaking down silos, enabling the creation of a clear customer view and tapping into the potential of Advanced Analytics technologies.

Its adoption is stable with around 70% of companies using it, but the most interesting data in this edition of the Observatory relates to **CRM not as a tool but as a business area**, able to drive cultural change within the company from a customer and data-driven perspective.

Trends, challenges and opportunities

02

ENG for CRM

ENG for CRM

Thanks to our cooperation with the CRM Observatory we can analyse companies and the Italian market as well as their maturity in terms of CRM & the Customer Experience by offering extensive annual surveys. The Observatory is a space for reflection and discussion with professionals with an interest in these issues, who contribute to the development of a community. It is an indispensable tool for research and observation, allowing us to understand the needs and expectations of companies, identify trends, and intercept insights to orientate ourselves in the continuous evolution of the company-customer relationship in this digital era.

As already discussed, the digital transformation of relationships between companies and customers has accelerated considerably in recent years, prompting all organisations to renew their strategies and business models.

At ENG, we take a four-pillar approach to building a **robust Digital Transformation strategy that enables new business models**, as illustrated in the figure below.

In the coming pages, we will explore how this approach can also be applied to CRM project management. The first step in a successful CRM project is to review strategies, followed by a redesign of the blueprint and implementation of new processes, as well as identifying new skills to be acquired or developed by the personnel involved.

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4 PILLARS FOR A
Digital
Transformation

STRATEGY

Explore & Upskill

Research & Innovation
IT & Management Academy
M&A & Startup Observatory

Strategy & Design

Business Consulting
Processes & Services Redesign
UX & Usability/Accessibility

Implement & Integrate

Traditional & Enabling Technologies
Proprietary & Partner Solutions
Project Management

Manage & Evolve

Application Management & Transformation
Managed Services
Digital Workplace

ENG for CRM

Strategy & design for a successful CRM project

For a CRM project to be genuinely effective and generate real value, the opportunities offered by the technology must match the needs of the business: this requires a clear shared strategy to be agreed between the various parties involved before any technological development can take place.

It is necessary to define the objectives and priorities, the project scope, the processes supported by the CRM and the related transformational requirements, as well as the organisational and cultural aspects that are required to foster the change that the adoption of a CRM requires.

Customer Engagement

Our ENG CRM & Digital CX Consulting Services skills specialists support organisations throughout the entire digital transformation process, complementing and supplementing the abilities of the Engineering Group in the design and implementation of CRM and CXM

systems. From support in defining a new strategy and redefining customer relationship management processes, to change management, from services to select the application suite to support in managing its adoption, we help our customers with technological, organisational and cultural transitions.

We offer a pool of market analysts, marketing and digital channel experts, sales and customer service professionals, technology and change management experts, and trainers. **Experience, skills, a methodological approach, innovation** to realise initiatives within the CRM environment and CX that can align business strategies, processes, people, technologies, and applications.

+20 Years experience

+20 Professionals

+100 Customers

+90 Customer satisfaction

We offer services to support clients throughout the entire project cycle.

Before the implementation phase:

- we facilitate the design of a new CRM – Customer Experience strategy through **Visioning | Envision sessions**;

- we support our stakeholders in understanding their own level of digital maturity and in defining a transformation roadmap, through the specific activities of the **Digital Maturity Assessment**;

- as a result of the **services assessment** carried out, we recommend the redesign and/or evolution of processes related to customer management in order to innovate the customer experience and, as a consequence, the enabling technological and application architecture;

- we assist our partners in the selection of technologies and applications to support the transformation project through **Software Selection**.

During the implementation phase:

- we assist the partner in the direction of the entire transformation programme and the evaluation of the results obtained through the **Governance** of the whole project;

- we design and implement all change management activities to facilitate the adoption of new technologies and applications with the services of **Change & User Adoption Management**;

- we support companies in the design and implementation of a new Customer Experience, starting from **User/Customer Research** in the fluidity of physical and digital contexts, and moving on to the definition of unique **User/Customer Journeys** that can establish a two-way relationship and mutual communication throughout all moments of contact with their customers.

We offer **training services** at any time on CRM, Relational and Digital Marketing, Customer Experience, Sales & Service.

ENG for CRM

Implement & integrate

After defining the strategy and choosing the CRM solution best suited to the business, technological and budget requirements, the most delicate part of the technical development phase is the integration of CRM within the company's application architecture, so that it can be fed with strategically and operationally relevant data for process management purposes. The main CRM softwares can actually be integrated with existing business systems and the current trend is for complete application suites able to allow 360° management of customers, rather than being limited to the relational processes typically supported by CRM software.

Through our Competence Centre Engineering Advanced Enterprise Platforms we guide companies to evolve towards Intelligent Composable Business, offering the best technology from SAP, Microsoft, Oracle and Salesforce vendors and becoming the driver of digital transformation for our customers. The Competence Centre has over **1,600 members** of staff and has implemented more than **1,000 projects** worldwide. The **Intelligent Enterprise** model aims to constantly improve performance, applying a form of business management that uses new technologies and digital services to ensure that the company is data-driven, constantly operational, customer-centric, efficient and responsive to change.

ENG for CRM

Advanced Enterprise Platforms / At a Glance
We Build Composable Digital Ecosystems by using market best-in-class solutions.

Composability allows companies to integrate any solution, **brick by brick**, creating an intelligent enterprise that evolves enabling agility, flexibility, and capable to continuously evolve and adapt.

HYBRID APPROACH

1.600+
Enterprise Solutions Consultants

25+
Years of technical expertise

Gold Partner

SAP

Microsoft

600+
AMS Global Specialists

Valuable Network
Cornerstone
UKG Kronos
Mulesoft & others

Summit Partner

salesforce

1.000+
Worldwide Projects

Stars Alliance
Global Coverage

Platinum Partner

ORACLE

ADVISORY

TECHNOLOGY & IMPLEMENTATION

PARTNER SOLUTIONS

MANAGED SERVICES

Focus on

Digital to evolve and modularity

Our design approach combines solutions with the Digital2Evolve strategy, allowing customers to make the most of modularity.
Modularity facilitates innovation and ensures long-term sustainability, including economic sustainability, in an ever-changing technological and business landscape. All this is made possible by using innovative technologies that natively offer and maximise the use of standard components.

At the same time, they make it possible to minimise customisation tasks in a no-code/low-code oriented manner, limiting the full-code approach to cases where it is strictly necessary.

Salesforce

🎓 **+20**
Years of experience

📑 **+1200**
Salesforce certification

🗇 **+600**
Projects worldwide

🌐 Global Delivery

The Salesforce CRM model has built its success on approaching the customer experience with care and attention. It offers advanced Cloud solutions for the 360° management and automation of marketing, sales and post-sales processes with a **SaaS model (Software-as-a-Service)** that helps customers to accelerate innovation with solutions that are more secure, more scalable and constantly updated with new functionalities that are in line with the times, thanks to 3 annual feature-rich releases.

These SaaS services are based on multi-tenant cloud architecture, so that all users and applications share a common centrally managed and optimised infrastructure.

But Salesforce does not limit itself to supporting the Customer Relationship Management processes of its customers.

In fact, through its own **PaaS (Platform-as-a-Service)** services, it has extended the common **IaaS (Infrastructure-as-a-Service)** model with a set of Cloud-based services to enable developers, ISVs (Independent Software Vendors), Salesforce partners and business users to quickly and intuitively deploy and distribute user-friendly applications. All this is done without the need to buy and manage any hardware components or install and update any software, as it is harmonised through the Cloud.

ENG's Salesforce delivery division is part of the Competence Center **Advanced Enterprise Platforms (AEP)**, which, thanks to the acquisition of **WebResults** in 2015 and **Atlantic** and **Be-Shaping The Future** in 2022, includes more than 450 professionals, and has focused for more than 20 years on **multi-cloud technologies** centred around the Salesforce.com platform ecosystem.

It is a **Consulting Certified Partner** which can boast over 500 certifications and more than 200 successful projects implemented in various market segments and for different Clouds.

It is also an **Independent Software Vendor Partner** of Salesforce, and able to build and distribute products through the **Marketplace AppExchange**, extending the portfolio of solutions aimed at accelerating customer innovation with Salesforce through vertical, market-specific modules.

From the point of view of business processes, the evolution of CRM processes in terms of the Omnichannel Customer Experience is increasingly crucial in ENG's approach.

This approach offers the company notable benefits: from improving the level of perceived customer satisfaction to increasing customer engagement and potentially increasing sales.

Focus on

The range of services we offer synergises completely with clients so that - together - we can build the professional services that best suit their needs with:

- **consultancy services, solution evaluation and design**, process analysis with subsequent implementation and customisation of the platform with a **no/low-code** approach, improving reliability and actually reducing the presence of 'bugs' in the implemented solutions, with a strong focus on the integrated **Customer Experience**

- providing insight into the latest Salesforce ecosystem news and innovations by releasing new features three times a year and new products resulting from acquisitions and/or internal Salesforce innovation drives, such as the very recent Data Cloud, AI Cloud and Einstein GPT

- design and delivery of **end-to-end CRM implementation and integration projects** in harmony with the customer's own application map, with a **multi-cloud** approach on the Salesforce ecosystem and the adoption of **market best practices** and, where possible, using low implementation impact solutions for accelerators or applications available on the AppExchange portal and implemented by ENG / Atlantic and other ISVs

- client support regarding **training** for the new system with particular attention to user-adoption for both Business users and IT users

- **support services and evolutionary maintenance** of the systems in production, including the design of **Continuous Development, Continuous Delivery and Continuous Integration** processes to ensure that system evolution processes are robust.

Microsoft

+1000
Professionals and partners

+500
Projects developed

Worldwide Roll-outs

+2100
Individual certifications

We are among the first partners in Italy of Microsoft solutions for business.

In over 20 years we have gained expertise in Microsoft Dynamics, markets, processes, and developed innovative and strategic services in over 500 projects worldwide.

Microsoft has always been involved in CRM: the real revolution came with the advent of **Microsoft Dynamics 365**, the scalable, modular and flexible solution that integrates **ERP** and **CRM** functionality **all-in-one in the Cloud**.

Companies, particularly medium and large-sized ones, require agile and automated operations management with data-intensive activities. CRM systems are a vital tool for these companies to reduce overheads and operate at margins that would otherwise be unsustainable without software-as-a-service (**SaaS**) solutions.

Dynamics 365 guides salespeople and agents through the right actions, provides them with real time information and optimises campaigns, product configurations and pricing. A significant artificial intelligence component enables process automation and accelerates the management of the right information at the right time.

Strongly integrated with the Power Platform ecosystem, Microsoft's low-code platform geared towards the Citizen Developer, Dynamics 365 adapts easily to business processes and integrates with a vast number of third-party systems through connectors provided by the platform.

In addition, the platform has a Customer Data Platform component that makes it easy to collect, unify, enrich

and analyse customer information in order to build a single Customer Profile from which Actionable Insights can be activated to support sales, support and marketing processes.

Through the concept of "One Platform" Dynamics 365 makes tangible the assumption that processes are not ends in themselves and separate, but that information, collected and enriched through all the phases of contact with the customer, allows to improve performance and customer loyalty: a good customer care allows to feed more effective marketing and sales processes; a structured sales process allows to execute more targeted marketing actions and to deliver a more efficient customer service.

Microsoft Dynamics 365 makes it possible to manage, in a homogeneous way even in companies that operate internationally, customer information through processes structured in such a way as to optimise the efficiency and effectiveness of the actions to be carried out: this guarantees homogeneity both for the customer and for the company, which can, through the data received, create increasingly high-performance models with the support of AI & Advanced Analytics.

The Competence Centre operates in several markets ranging from Manufacturing to Retail, FSI and PA, developing projects that embrace all the typical

CRM processes and supporting its customers in the adoption of the platform through a structured path of reorganisation and evolution of their way of working, starting from the sales and placement process, passing through the management of real-time and outbound marketing to arrive at the digitalisation of the entire process of assistance and after-sales services.

SAP

+1400
Consultants worldwide

+1000
Projects worldwide

+25
Years of experience

+150
Active AMS services

We have been a leading player in the Italian market in the field of SA for over 25 years through our Competence Center Advanced Enterprise Platforms.

With more than 1,400 SAP specialists and over 1,000 internationally active projects, we are designing, implementing and developing innovative SAP ERP solutions worldwide.

SAP launched the SAP C/4HANA suite in 2018, later renamed **SAP Customer eXperience**, an intelligent customer experience solution that helps connect customer data, improve loyalty and grow business.

By expanding on traditional CRM, the SAP solution addresses the world of today, where buyers expect immediate interaction with brands regardless of time and place and where brands need to know their customers inside out.

Using SAP Hybris systems and incorporating them into microservices and machine learning, SAP has created a solution that reinvents the very concept of selling products and services, transforming simple transactions into real long-term relationships.

The suite comprises **five cloud solutions** that facilitate a connected customer journey, based on empathy and trust, and help companies to innovate, integrate and adapt:

- **SAP Sales Cloud** uses embedded artificial intelligence to improve predictive accuracy, identify risky options and increase win rates by suggesting which tasks or interactions to carry out

- **SAP Service Cloud** enables fast, personalised and effective customer service. Customer contacts

across multiple channels are linked into one single solution so that staff members can get a comprehensive and consolidated view. With the right information, they are able to improve engagement and first contact resolution.

- **SAP Commerce Cloud** is a solution that provides an agile and flexible e-commerce platform for B2B and B2C companies that harnesses company-wide data to increase revenue and customer satisfaction, thereby generating consistently profitable e-commerce revenue.

- **SAP Emarsys Customer Engagement** enables customer profiling, multichannel campaign organisation and engagement strategy development

- **SAP Customer Data Cloud** allows customer information and data to be collected, stored and safeguarded, creating consolidated profiles and providing a 360-degree view of the customer. Offer customers transparency and control, in full compliance with GDPR regulations.

The solutions can be **verticalised for each market sector**, enabling clients to manage the entire customer experience with an integrated approach, starting with the native connection to the ERP Cloud, and covering e-commerce, sales, service and marketing, all in line with sector-specific best practices.

In keeping with the SAP strategy, **we developed a qualified Solution Extension for the Pharma sector** based on the SAP Sales Cloud platform.

[SmartFit Pharma](#) structures and simplifies sales activities by streamlining customer data collection and managing the conversion from Lead to Opportunity by consolidating all the information required for the preparation of pharmaceuticals, dietary supplements, cosmetics and other products.

The solution guides sales representatives throughout their journey and helps them to liaise seamlessly with other departments.

Adopting a package enables companies to respond to the challenges of a market that increasingly demands speed and flexibility.

Qualtrics

Building on experience accumulated over previous years, in May 2023 ENG partnered with Qualtrics, the **world's first experience management platform**, and named a leader by Gartner in Voice of Customer, Employee Experience Management and Social Listening.

Qualtrics is designed to allow key business data to be gathered, analysed and acted upon at any touch-point within the customer journey.

It listens across all channels, highlighting possible attention points for targeted action regardless of the reference architecture.

It therefore allows interactions with customers and employees to be transformed into close-the-loop interactions, leading to more efficient processes and strategies.

The modular platform makes it possible to tailor its potential to the needs of our customers and to each type of business.

The aim is to make end customers an active part of the narrative, a voice to be listened to in business decisions, safe in the knowledge that any requirement can be resolved quickly and professionally.

Qualtrics integrates with any CRM system and provides AI and Machine Learning tools capable of understanding everyday language, making the world of social media no longer a challenge but a mine of information.

The solution's omnichannel approach breaks down all

Focus On

communication barriers, and thanks to our experts, we are able to tailor messages to each generation through passive and active listening, respecting the needs and ways of interaction of all ages.

Using SAP and Qualtrics technologies, our Competence Center Advanced Enterprise Platforms listen, empower and support customers by adopting a consultative approach to add value to business processes.

03

Managing and developing CRM projects

Managing and developing CRM projects

Integrating a CRM within a business organisation is not the end point of a successful project, but rather the starting point: the entire company is able to access the data, enrich it, and automate their activities. The CRM then becomes fully operational and, thanks to the dashboards and reports developed within the system, results can also be monitored in real time.

At ENG, we position ourselves as a strategic partner not only in the choice and implementation of the best technologies and solutions on the market, but also in their management and development.

Thanks to our knowledge of core processes and our ability to always work alongside our partners, we are able to continually redefine their CRM strategies and priorities in terms of processes, organisation and system functionality.

We help them to incorporate internal and external feedback into their strategy, so that the CRM project integrates business and technological approaches to progressively improve the relationship with the Customer Base.

This way, it will support relational processes more and more effectively and qualitatively with the aim of providing users with a single customer view and maximising the experience offered to customers.

We also support our partners in another challenge, which is crucial at this stage: the adoption of CRM by all users.

We support company staff training and the identification of change management levers and messages to overcome obstacles to the adoption of CRM and share both operational and strategic benefits: the system must be understood by users and become a daily work tool.

04

ENG innovation in CRM: some projects

ENG innovation in CRM: some projects

CASE STUDY / DIGITAL INDUSTRY
Strategic, operational&analytical CRM for Argo Tractors.

We helped a leader in the agricultural mechanisation sector to implement a long-term CRM strategy.

The project envisaged an analysis phase to understand the areas of improvement and needs, which allowed our team of consultants to draw up a medium-long-term CRM strategy with a rollout split into 3 waves: development of a CRM for Argo Tractors branches to manage data and requests relating to leads and customers, multi-channel campaigns, satisfaction surveys; extension of the CRM to Argo Tractors dealers to manage lead and customer requests generated by the branch, contacts, activities and opportunities generated locally; campaign management. The project involved 8 branches and 700 dealers. In addition to the availability of CRM and Customer Database functionalities for both branches and dealers, the results achieved included a considerable increase in requests for quotations and tractor demos and greater efficiency in managing contacts.
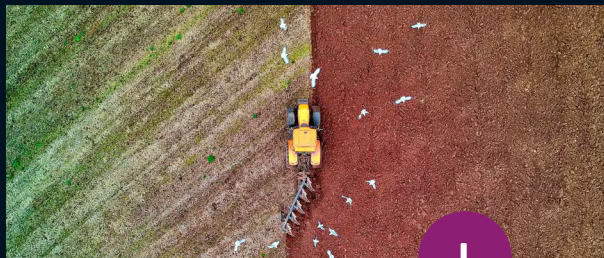
CASE STUDY / DIGITAL INDUSTRY
A digital transformation project with CRM at its heart.

We helped the customer - a world leader in the production of printing and converting machines - with the digital transformation process with the aim of implementing a new model for customer management.

The solution implemented made it possible to expand and improve the range of services offered to complement their products, to innovate relationships and, at the same time, to streamline Customer Service activities and make them more effective. The project identified the Microsoft Dynamics suite as the best technological solution, with the adoption of the Customer Service, Field Service, Sales and Marketing modules, as well as the use of Microsoft Power Apps to design the Customer Portal. The Service module was integrated with the CTI TalkDesk platform, while ENG provided RealWear smartglasses to support the Remote Field Assistance technicians. Our Consulting Team supported the client in all project governance activities, from start-up to end-user training.

USE CASE / SAP SALES CLOUD
Digitize the lead management process with ENG and SAP Sales Cloud.

An Italian and European industrial reality for the development, production and packaging of dietary supplements, medical devices, probiotic-based drugs and cosmetics has redesigned the customer journey by adopting a CRM. SAP Sales Cloud is the process engine in which to collect initiatives and manage opportunities and customers through integration with S/4HANA, through SAP Cloud Platform Integration, which allows you to: configure new products with a user-friendly survey, manage a master customized products and sales activities, profile customers and prospects, gain real-time insights through customized dashboards, promote involvement of the R&D department, access data from mobile.

The solution has enabled the improvement of strategic and operational data flows with a marked increase in efficiency. From this experience comes the Smartfit Pharma package for smart management of sales opportunities.

Engineering ©

CASE STUDY / SMART ENERGY AND UTILITIES
CRM transformation

Our team initiated the digital transformation of the CRM being used by the client.

The client needed to embark on a digital transformation of its CRM to overcome the functional and technical limitations of the existing model, related to data visibility and operational structure, and the lack of a single and omnichannel view of the customer, which further widened the gaps in data management. Our team supported the overhaul of sales and post-sales processes by migrating the previous CRM solutions to the new Salesforce.com Cloud platform. In particular, with the Service Cloud solution, customer information and data were centralised in one system and made immediately available in an omnichannel context. The complex management of more than 100 processes is supported through ProcessClick, a framework developed with Salesforce technology, which provides a point & click mode to configure and guide the entire life cycle of each business process.

CASE STUDY / SMART ENERGY AND UTILITIES
Loyalty cloud on Salesforce

Our solution enabled a leading oil company (Fuel Retail sector) to replace its marketing platform with a SaaS solution.

The platform had to be able to manage specific campaigns for loyalty users. The aims were to create customer profiles that could be used for planned campaigns and to initiate new customer profiling paths to be devised for new campaigns.

Our solution adopted a Salesforce-based architecture for the CRM. It is integrated with the mobile app that is used to manage the loyalty system, the transactional data warehouse system, and the POS system for the physical management of the loyalty card. Today, we manage high annual volumes of requests across multiple channels: around 27 million emails, more than 5.7 million SMS, and around 600,000 push notifications, with more than 1.2 million contacts.

CASE STUDY / DIGITAL RETAIL & FASHION
Qualtrics

Through Qualtrix, we improved business processes and boosted employee engagement. A leading telecommunications operator in Italy needed to assess compliance with company procedures, analyse employee attitudes and understand their level of involvement, especially during and after the COVID-19 emergency. We placed employees at the centre of the corporate narrative, involving them and making them a significant part of the company's development. This was achieved by first implementing Qualtrics, then integrating the solution with SAP SuccessFactors. We conducted several surveys to capture the level of employee engagement. In particular, "Return to Work Pulse" to examine confidence in returning to the workplace and "Remote Work Pulse" to investigate the feelings of employees who worked at home during the Covid-19 crisis. We capitalised on the full potential of the tool by integrating it with SAP Success Factors, synchronising the Qualtrics Employee Directory with the SSFF employee database.

ENG innovation in CRM: some projects

05

What is the future of CRM?

The digital transformation is driving organisations to adapt their business processes and models to the new market reality. This change is led not by companies, but by customers. There is a growing number of "always-connected customers" who expect to receive content that corresponds with their needs anytime, anywhere, in their preferred format and on the device of their choice: increasingly, we find ourselves discussing the "**seamless omni-channel customer experience**" and "**connected channels**". Their journey is transforming the strategies adopted by brands to engage with their customers in terms of channels as well as processes and tools.

The Customer Journey, i.e. the sequence of points of contact between the customer and the company throughout its lifecycle, is becoming increasingly digital.

This trend has a profound impact on relational processes, i.e. those business processes which, as we have already analysed, involve interactions with the Customer Base from the acquisition phase to the retention phase: Marketing, Customer Care, Sales, Post-Sales, and e-Commerce.

Efficient, accurate and intelligent management of these processes should therefore increasingly rely on three indispensable components:

• **the central role of the customer** in the organisation with the aim of optimising the customer experience and consolidating the relationship between the customer and the brand over time, reinforcing brand-awareness and the customer chain;

• **a data-driven approach** geared towards better knowledge of one's own customer base and therefore towards increasingly personalised relationships through the use of a reactive and proactive strategy, harnessing Artificial Intelligence technologies capable of making data actionable and offering a personalised and 'tailor-made' experience to meet customer needs;

• **technology**, an essential facilitator of this transformation, necessary to add value to the company's business and drive the innovation underpinning the omnichannel nature of the customer journey, the efficiency of internal and external processes, and the integration of data for advanced and predictive analysis.

The most advanced CRM software is becoming a pivotal application solution for Digital Transformation, as it supports these processes by allowing them to adapt to the speed of change in consumer behaviour, to personalise their experience with data and finally to facilitate the collaboration of indispensable corporate resources.

The real paradigm shift dictated by recent developments in **AI & Advanced Analytics** is prompting companies to once again rethink their models in a more effective, automated and intelligent form. The new technologies, supported by the growing availability of computational capacity and the tremendous scientific advancement in the field of NLP (Natural Language Processing), have been able to bridge the gap in these innovations by making them simpler, more usable, and accessible by all.

The challenge is to transform CRM data into new models, starting with a data structure that has to be empowered and properly trained, so that these models

can learn and interpret meaning correctly.

An AI capable of supporting a natural and fully human-like conversation is unlike anything we have seen in the past. This particular type of AI is now known to the world as Generative AI. Technology that can answer questions or enquiries in natural, human language. The most innovative versions can even create summaries, identify and suggest actions, generate real and fictional images, find and correct errors, and generate programming code based on your requirements and context.

The most advanced CRM systems already incorporate these technologies. The potential for change that AI can bring to our daily lives is truly unlimited, and it is crucial to know how it works and how to properly master this intelligence.
To meet these future challenges, we at ENG accompany our clients throughout the entire project cycle in the adoption of CRM.

On the one hand we offer important and consolidated delivery skills related to market-leading **CRM technologies** (such as Salesforce, Microsoft and SAP), and on the other hand we provide a team of **strategic and process-related experts** who are always up-to-date with the new trends and technologies, allowing us to support companies that need to be guided in their business and application choices.

Engineering is the leading **Digital Transformation Company in Italy**, constantly expanding throughout the world, with about **15,000 employees and over 70 locations**.

The Engineering Group, made up of more than **70 companies across 14 countries**, has been supporting companies and organisations in their continuous evolution for **over 40 years**, through its in-depth understanding of business processes in all market segments, and by harnessing the opportunities offered by advanced digital technologies and proprietary solutions.

The Group integrates **best-of-breed** market solutions with **managed services**, and continues to grow its expertise through M&A projects and partnerships with major technological organisations. Engineering invests heavily in innovation, through its **R&I division**, and in human resources, through its **IT & Management Academy**. **Engineering is a key player in the creation of digital ecosystems to connect different markets**, developing **modular solutions** for ongoing business transformation.

What is the future of CRM?

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