

Enterprise CRM: Integrating Acquisitions



Master Data Maestro®

Integrating different technologies and approaches to customer management across business units can be especially challenging when it comes to acquisitions.

For example, your enterprise is standardized on Dynamics CRM, but you acquire a new business unit that has been using Siebel CRM for the last 20 years. The business unit's highly successful sales force is made up of seasoned professionals who are essentially technology entrenched. They are used to and have been successful with their existing system, so they are not eager to embrace new technology. You want to move towards a homogeneous environment that would reduce cost and complexity from an IT perspective, and allow you to incorporate the new business unit's customer and sales data in an enterprise-wide C-level view of the business. But trying to force new technology on this sales group at the outset raises the risk of negatively impacting an established sales channel that could account for 20 percent of the company's total sales within the first year.

By using Maestro to coordinate CRM across your organization, you have in place the means to leverage and preserve the Siebel CRM instance that is in place in the new business unit, while at the same time ensuring that the customer data it holds can be seamlessly integrated with your Dynamics CRM instances, as well as with your other enterprise systems. In this way, your newly acquired business unit can continue to focus on sales, and not on having to learn a new system right off the bat.

The integration process starts with creating a new version of the Siebel model in Maestro. The data stored in the Siebel model is evaluated to determine if new fields need to be created by Maestro, then the new system version is populated with all of the existing data records from Siebel. It is important to note that nothing changes in the underlying Siebel system. You will be working on a copy of the master data, so there is no risk of corrupting or losing existing data; you can always revert to the original version at any time, if needed.

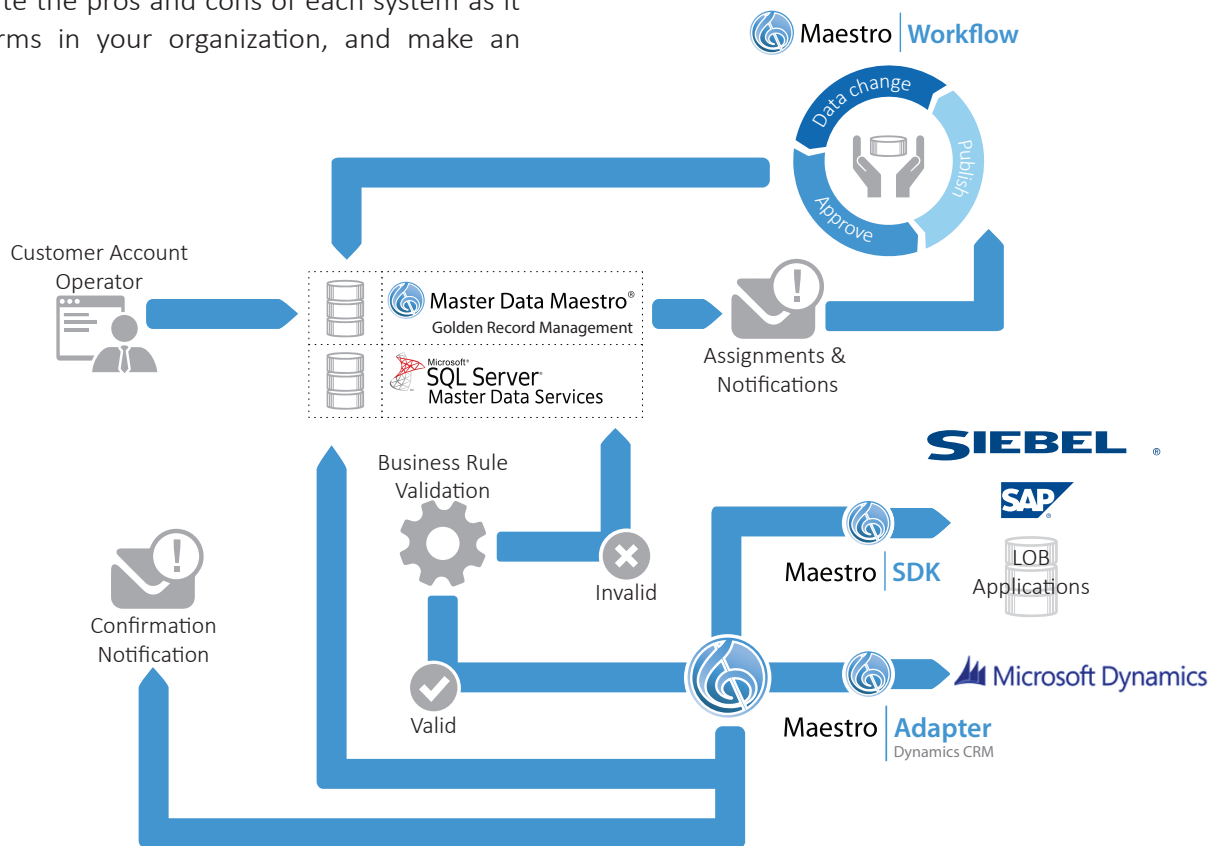
Once you've created a version in Maestro, you can use matching to find customer synergies across your other systems, and identify harmonization opportunities to complete the data within the Siebel model. Additional field mapping can be applied to enhance data integration. The key is that the initial integration work doesn't have to be in the production version of the Siebel instance. The new version in Maestro is simply a copy; throughout the integration process, both your Dynamics CRM systems and the Siebel system are still in play, accessible and operational throughout.

Through this approach, the team in the newly acquired business unit is not being forced to use a new and unfamiliar system out of the gate, and even more importantly, won't fear that their hard-won customer data is being put at risk, or out of their control. Much of the challenge of a successful integration is to make sure that the people on both sides work together to preserve data, and that they consent to receive and understand how to work with any enhanced data. In

this way, the newly acquired sales team is able to see value right away from access to the customer data that already exists in Maestro, CRM and other systems across the enterprise, and can begin to perceive the benefits of being part of a more homogeneous enterprise CRM system. Such benefits include the use of matching and survivorship for data management value, and to provide a more complete picture of common customers, with access to additional attributes tracked in systems elsewhere in the organization. With this value perception in place, you can work with the new users to see if Dynamics CRM can support their needs on an ongoing basis, as either an integrated separate instance, or as part of a single enterprise instance.

With both systems in play, side-by-side, you won't have to mount an external Request for Information (RFI) initiative to determine the best course of action going forward. You can evaluate the pros and cons of each system as it actually performs in your organization, and make an

appropriate decision about how you want to proceed. You may decide it is not necessary to remove the outlier, the acquired Siebel system. However, you may determine that you need to do so to avoid potentially costly licensing consequences, as the new business unit is integrated into the enterprise, and managers from other areas of the organization require access to it. You may determine that keeping the Siebel instance adds complexity and costs for customization, integration, and ongoing support that aren't likely to be a good ongoing investment for your organization. The good news is, if and when you do choose to remove the Siebel instance and standardize the acquired business unit on Dynamics CRM, it will be a much more palatable and less disruptive choice in terms of operational continuity and user acceptance.



+1 678.202.8990 | info@profisee.com | www.profisee.com

Two Northwinds Center | 2520 Northwinds Parkway | Alpharetta, GA 30009 | USA

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