



the advantage is content

Managing Customer Relationships with Trusted Business Content

Documentum CRM Integration White Paper

Executive Leadership Series

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Every interaction with a customer or prospective customer represents an opportunity — an opportunity for enhancing customer satisfaction or generating revenue. Your ability to take full advantage of that opportunity rests on how well you know every customer's specific needs and how prompt you are in providing each customer with the right information or service.

Unlocking Enterprise Information for Customer Activities

Customer relationship management (CRM) has become an increasingly valuable enterprise application for gathering and organizing information about customers and prospects to enable better customer service, retention, and marketing. CRM applications gather and track data every time a customer makes an inquiry about products or services or contacts support, every time a sales associate makes a call or finalizes a sale, every time a direct mail piece is sent and responded to. This information is a potential gold mine for companies who realize its value. Gathering and managing customer data not only enhances customer service, but contributes to long-term customer loyalty, supports lead generation efforts to speed customer acquisition, and improves revenue opportunities through direct marketing and cross-selling.

Converting customer interactions into purchases, customer loyalty, and increased customer satisfaction depends on your ability to leverage this customer data along with other types of content and distribute that information to employees who engage customers directly, as well as other employees across the enterprise. Enabling broad access both to business content and to customer data requires a seamless integration between your CRM application responsible for managing customer data and a content management application responsible for managing enterprise content in a secure and completely trustworthy manner. Such an integration

would allow company agents and other enterprise users to easily access all kinds of content — structured customer data managed by a CRM application and unstructured content managed by Documentum — and leverage that content in their interactions with customers through a number of delivery channels, including phone calls, the corporate Web site, and direct marketing.

That integration is available today with Documentum 4i. Now, companies that have deployed applications for customer relationship management gain a powerful tool in Documentum 4i for managing all types of information related to customer care. Whether that information is used during customer support calls, in direct marketing, or on the corporate Web site, all organizations across the company can work together to manage the content that drives customer satisfaction and generates revenue opportunities. Previously isolated organizations, such as marketing, sales, and support departments, can collaborate and leverage each other's efforts to help meet customer needs, improve efficiency for customer representatives, and coordinate successful sales and marketing objectives. Empowering these departments with enterprise content management (ECM) from Documentum provides the highest level of security and confidence for consistently accurate, reliable, and up-to-date information available across organizations. Among content management vendors, only Documentum provides a feature-rich platform capable of integrating CRM and ECM and delivering seamless access to the information critical to business success.

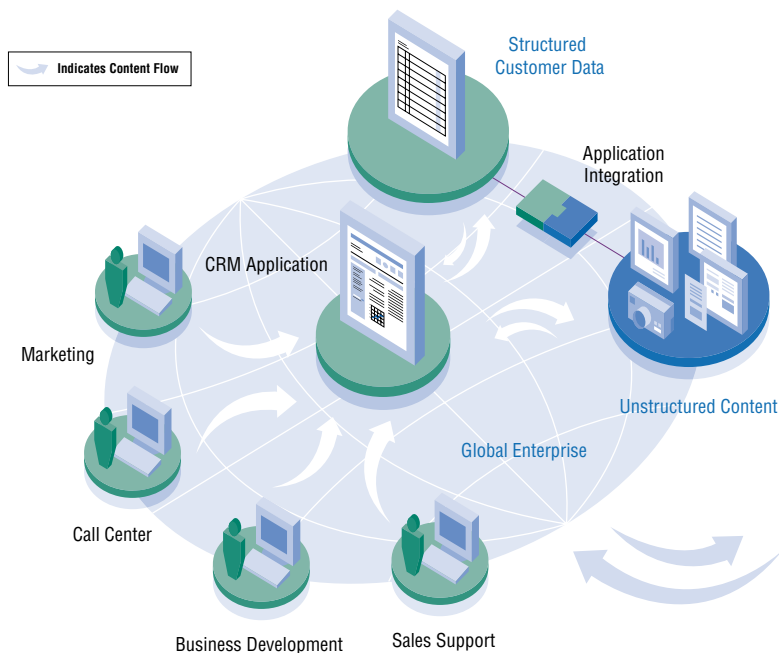
CRM and ECM: Complementary Technologies

CRM applications manage data such as contact information for customers and prospects and records of customer interactions, often made during sales or support calls. This information is typically stored as structured data that is entered and retrieved by means of form fields and organized by means of database records. CRM applications are highly efficient at tracking and reporting this data, in part because of the structured nature of the data and the application.

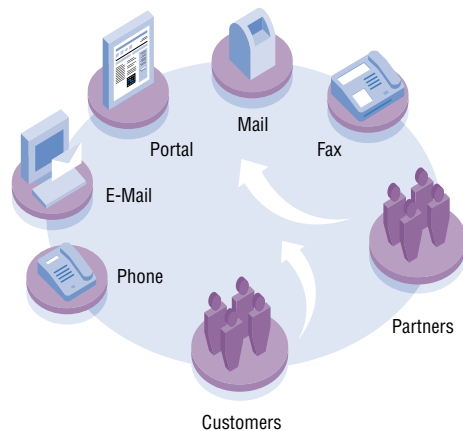
However, structured data is only one part of customer-facing data. Recent estimates by analysts suggest that as much as 85 percent of managed data, or content, is unstructured, including digital images, video, digitally rendered faxes, e-mail messages, and text documents. CRM applications are not particularly adept at managing unstructured content; they don't have the robust functionality required for handling the indexing, searching, and security of huge volumes of information in multiple formats. For these functions, large companies invest in content management applications. To manage all of the information related to customer interactions, therefore, companies need the combined capabilities of both a CRM application and a content management application, such as Documentum 4i.

As the leading ECM platform on the market, Documentum 4i manages all forms of structured and unstructured content. Documentum 4i also provides powerful content management services such as workflow and lifecycle management, version control, audit trails, security, full-text and attribute-based searches — functionality required for ensuring the accuracy and reliability of content that may be associated with business-critical data. Documentum 4i empowers business users across the enterprise with the tools they need to create and manage content, including integrations to popular desktop authoring tools, such as Microsoft Office; library services for protecting the integrity of content through check in/check out and configurable security; and an intuitive interface for enabling enterprise-wide access to the industrial-strength content repository through Microsoft Explorer, Web browsers, and corporate portals.

More importantly for customer relationship management, Documentum 4i provides a complementary, behind-the-scenes solution that integrates seamlessly with industry-leading customer relationship management applications, delivering an enterprise-wide solution for leveraging customer data and customer-related content to maximum advantage. Documentum 4i can automatically store incoming unstructured content (such as e-mail messages, faxes, and photos), enable sophisticated text- and attribute-based



With a Documentum CRM integration, customer interactions are captured through various means (phone, e-mail, portal, etc.) and stored automatically in a global repository — either as structured data or unstructured content. Company agents can access this information easily and leverage it to improve customer service and enhance revenue opportunities.



searches, link content to customer data managed by the CRM application, and allow authorized users to access this content through corporate portals, intranets, and inter-enterprise extranets. With these capabilities, Documentum 4i empowers non-technical users to collect, securely store, find, link, and easily retrieve content that does not fit the definitions of structured data. In short, the Documentum CRM integration provides customer representatives with *all* the information they need at their fingertips, allowing them to focus their attention on customer service and revenue opportunities.

Real-World Applications

Telecommunications Industry: Up-Selling to Existing Customers

A large nationwide construction company has contracted with a cellular provider for all of its field construction personnel. The contract specifies a maximum number of pooled minutes per month for a flat fee. However, recent significant growth in the number of construction projects has caused the company to exceed the maximum pool of minutes, resulting in a serious over-budget condition. To correct the budget problem, the construction manager responsible for this contract calls the cellular account representative to renegotiate a higher maximum limit.

Using his CRM application, the account representative retrieves and opens a copy of the contract. Because of the length and complexity of the contract, this document has been scanned and automatically placed in a Documentum repository by the legal department for more efficient, secure storage. To the account representative, the fact that the contract is linked to the customer record means that he can access it quickly without a lengthy search. The account representative discovers that although the contract does not permit changes during the term of the contract, it does contain a cancellation penalty that, while substantial, may actually save the customer money if the company renews immediately with a more favorable contract.

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Seeing this as an opportunity to save the customer money in the short term while renewing with a larger, more extensive contract, the account representative performs a Documentum search to locate recent service contracts offered to companies of similar size. Gathering that content, along with some recently published product literature also stored electronically in Documentum, the representative bundles everything together, attaches it to an e-mail message, and sends the information to the construction manager, automatically saving a record of this transaction for future reference.

High Tech: Providing Customers With the Latest Support and Product Information

Recognizing an opportunity for growing revenue while increasing employee efficiency, a high-tech company sets out to integrate its disconnected marketing, sales, and support departments by deploying a Web-enabled portal with access to both CRM data and Documentum content. This application would provide all personnel with a single, unified view of customer-related information, increasing productivity and the quality of customer service. The company would continue to use Documentum as a tool for allowing both technical and business users to publish content to the Web site and corporate intranet, and it would leverage an integration between the CRM application and Documentum to link published, approved content to customer records.

Managers in the marketing, sales, and support departments begin by designing a presentation template that enables employees to create and publish content using the same browser interface that they use to access CRM application data. In addition, the managers design the template to allow staff in each department to publish regular bulletins for the benefit of the other groups.

This new interface to CRM data and Documentum content yields immediate benefits. Marketing, sales, and support staff gain fast access to the same content for providing customers with the latest, up-to-date product information. Moreover, they acquire confidence that this content has been approved for publication. For example, when a support member is informed of a critical bug that could affect a large number of customers, that employee can immediately post a bulletin for broadcast to all field sales employees. When marketing announces the date for a new product release or upgrade, that information is also published, along with any supporting information, such as product data sheets. Sales staff can immediately access content relevant to these announcements and quickly link it to customer records for future reference and sales calls, enabling more effective marketing campaigns and creating new up-sell opportunities. And all groups are kept up to date with regular bulletins posted to the common interface, enabling more effective communication, support, and sales.

Pharmaceutical Industry: Accessing, Associating, and Distributing Critical Support Content

An adolescent, who has been taking a prescription allergy medication for several years, suddenly experiences unexpected side-effects. The child's mother calls her physician, who begins by asking her a series of questions. Not finding any root cause, the physician then e-mails a case description to the drug manufacturer along with some additional questions. A registered nurse at the drug manufacturer processes the inquiry and flags it as high priority, drawing the attention of a senior nurse, who reviews the case.

Customer representatives have the information they need at their fingertips, allowing them to focus their attention on customer service and revenue opportunities.

With the technology available to the staff of this company, the nurse is able to handle requests like this much more efficiently than in the past. The drug manufacturer uses a CRM application to process all drug-related inquiries from physicians and it uses Documentum as the single repository for drug research information. Using automated classification technology available with Documentum, staff can perform rapid, sophisticated searches based on cross-referencing hundreds of attributes.

Accessing Documentum through the CRM application interface, the senior nurse creates a query, specifying the drug name and the side effect. The search results point to literature describing several drugs which, when used in conjunction with the specified drug, may cause the indicated side effect. The nurse retrieves the literature and links it to the physician's inquiry. She then completes an e-mail response and sends the entire package to the physician. She also links the literature she found to a special "Competing Drugs" folder for that allergy medication so that this information can be quickly located for future inquiries.

The physician reviews the e-mail response and attached literature, poses additional questions to the mother, and learns that the child has been borrowing a brother's medication to treat minor facial blemishes. With the solution in hand, he then responds to the drug manufacturer to close the case.

The Documentum CRM Strategy: "Breadth and Depth"

The Documentum CRM integration strategy enables considerable functional breadth and depth based on access to accurate, reliable content stored securely in an enterprise-wide repository. The Documentum CRM integration provides marketing, sales, support, and other customer-facing personnel with access to key business information while eliminating redundant efforts and lowering the risk of error caused by inaccurate or outdated content. Business

users across the enterprise — even those in large, global companies with distributed organizations — can work in a collaborative and coordinated manner, focusing efforts entirely on meeting customer needs.

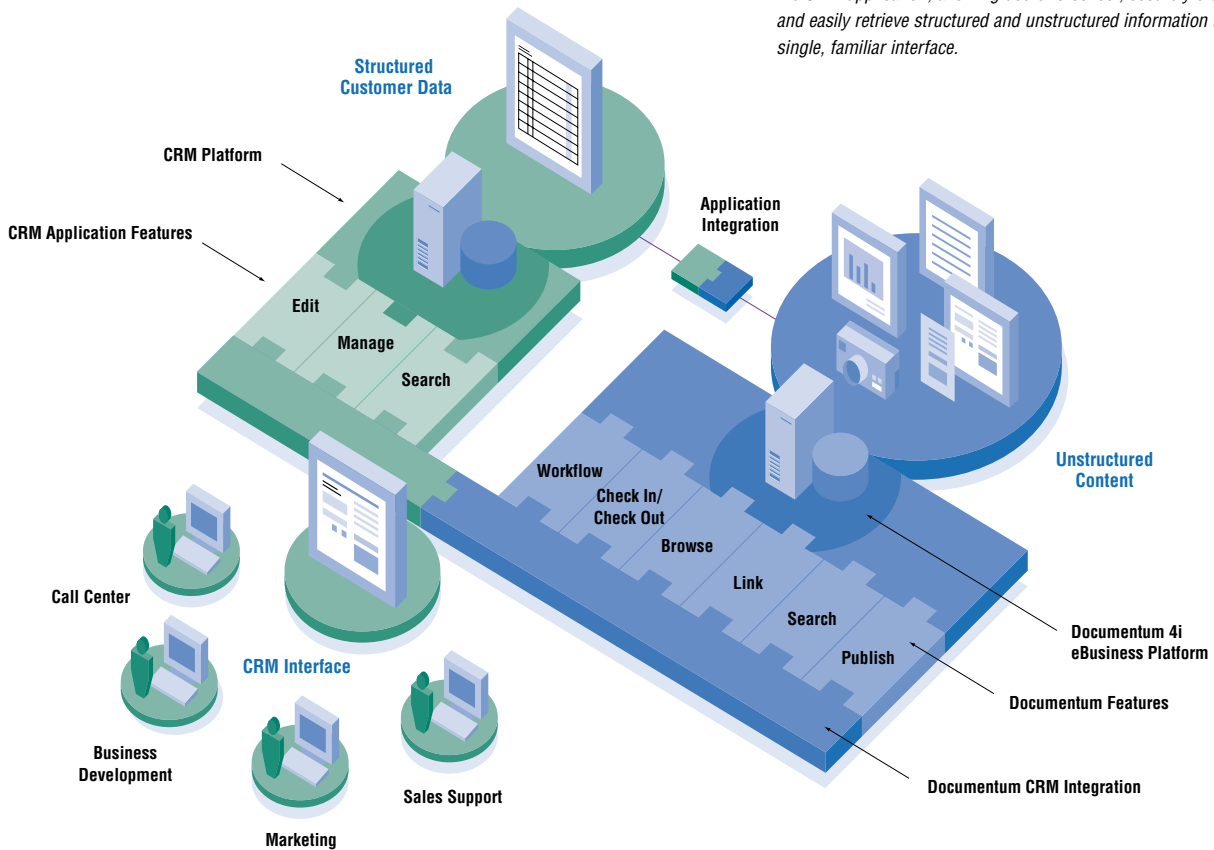
The Documentum CRM solution meets these key objectives:

- Easy content publishing from within a CRM application for delivery through any number of channels
- Powerful search functionality for locating and accessing information
- Instant linking for relating Documentum content to customer records within a CRM application
- Access to core repository services, such as check in/check out and full-text search
- Enterprise-wide access to a secure, open, industry-leading content repository and platform

Publishing Content within the CRM Application

Web publishing capabilities are a key requirement for supporting a new generation of CRM applications, which are typically implemented in a Web-based portal framework. With its integrations to leading CRM applications and its support for Web publishing, Documentum 4i provides all the tools and capabilities required by CRM users who need to create and publish content. Enabling business users to publish content to the CRM portal (and other channels, such as the corporate Web site) encourages the active participation and collaboration by all CRM users — connecting departments that are often disconnected. For example, posting customer support escalations as portal bulletins can prove useful to other groups responsible for identifying product or customer trends.

Documentum content management features operate seamlessly within the CRM application, allowing users to collect, securely store, find, link, and easily retrieve structured and unstructured information through a single, familiar interface.



Locating and Accessing Customer-Related Content

A central requirement for all large organizations today is the ability to quickly locate relevant, approved information. With a Documentum CRM integration, customer-facing personnel can leverage powerful search capabilities that go well beyond those provided by standard file management tools. Through a familiar interface, users can perform complex queries based on multiple criteria, employ full-text search capabilities to locate specific words or phrases that appear within documents, or pinpoint content based on attributes such as keywords, author's name, file type, or comment. Users can also examine all versions and renditions of content when, for example, a verification of changes is required. Once located, content can be viewed, checked out, edited, checked back in, sent through a collaborative workflow process, and linked to customer records. The tight integration between Documentum and third-party authoring tools, such as Microsoft Office, allows CRM users to double-click a content file and immediately launch its native viewer or editor.

Associating Business Content and CRM Data

The ability to link trusted, unstructured content to CRM data increases end-user efficiency and lowers the risk of errors caused by inaccurate or outdated content. The same content can be linked to CRM business objects in a one-to-many or many-to-one relationship, allowing the CRM user to confidently attach content in any format to any number of customer records. For example, a representative who receives an e-mail message from a customer can immediately attach it to the customer's record, at the same time saving it securely in Documentum. Other content, such as digital photos or scanned faxes, can also be stored in the Documentum repository and associated with customer records. When content is updated and approved by the content owner, the latest version is immediately available to every CRM user and automatically updated in customer records, dramatically reducing the likelihood of errors.

With access to accurate, reliable content, business users across the enterprise can work in a collaborative and coordinated manner, directing their efforts entirely toward meeting customer needs.

Accessing Core Repository Services

The advantages of enterprise content management are not limited to providing targeted, personalized content for enterprise users within a CRM environment. An integration with Documentum also provides access to content management functionality, such as check in/check out, access control and security, lifecycle management, annotation, workflow processing, classification and attribute tagging, and collaborative authoring. Many of these functions can be embedded as services — discrete, easily integrated components launched as needed by CRM users from within the CRM application. Or they can be accessed seamlessly as a natural function of enterprise content management. In fact, because content management operates largely behind the scenes, one of its key advantages is its invisibility. Users author, manage, publish, and link approved, trusted content and data easily, intuitively without requiring explicit skills or special training.

Leveraging an Open, Secure, and Scalable Platform

Core Documentum functionality is accessed through a server platform, which has the following features:

- Support for wide-variety of Unix and Windows-based platforms and operating systems
- Scalability and optimized performance across multiple platforms and repositories
- J2EE compliance and native, end-to-end XML capabilities
- Open, developer-enabled server programming environment
- Secure access through support of digital-certificates, SSL, and object-level access control

Conclusions

Real-time access to accurate information makes employees faster and more efficient, ultimately resulting in improved customer-facing activities and greater coordination between organizations like customer service, marketing, and sales support. Leveraging a sophisticated repository designed specifically for the purpose of managing content empowers CRM and non-CRM users alike — adding capabilities that are not otherwise native to CRM applications. The return on investment becomes apparent in your ability to coordinate customer service throughout the enterprise, provide service better suited to the needs of customers, enable more precise and effective marketing, move prospects through the lead process, and build long-term customer loyalty.

Built on an Internet-scale, XML-enabled, and standards-compliant platform, Documentum products manage Web content, power portals, enable collaborative commerce, and solve regulatory content challenges. No other content management solution can equal Documentum 4i with its ability to manage the content critical for every e-business process, integrate with major enterprise applications, and confidently handle all types of content, including global Web content, enterprise documents, XML, and rich media assets. For these reasons, Documentum is without peer among content management vendors. For more information about Documentum or an opportunity to attend a free online demonstration, visit: www.documentum.com

Key Business Benefits of the Documentum CRM Integration

Improved Efficiency

Instant access to approved, up-to-date content eliminates errors due to obsolete content and powerful search functionality reduces time spent hunting for information

Enhanced Customer Satisfaction

Providing CRM users with access to enterprise content allows them to solve customer problems, address customer inquiries, and support customer needs more quickly and efficiently

Integrated Marketing

The ability of all users to access and reuse trusted content enables greater messaging and brand consistency throughout delivery channels — including phone calls, the corporate Web site, and direct marketing

Decreased Costs

Reusing content cuts costs and the time often spent recreating content that already exists, making all enterprise users more efficient

Minimal Training Costs

CRM users access Documentum content and services through a familiar interface with out requiring specialized skills or training

Increased ROI

Cross-departmental access to enterprise content improves lead generation and direct marketing efforts, drives down support costs, and increases sales opportunities for associates in the field

Future-Proof

Best-of-breed integration based on open standards leverages current investments and protects future investments



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