

July 19, 2023

Streamlining Business: ERP and CRM Integration Benefits



WELCOME

Today's Presenters



John VanMetreManager
Armanino Advisory LLC



Chelsea Henkel
Director
Armanino Advisory LLC





KNOWLEDGE

Learning Objectives



Discover how ERP and CRM integration can improve data accuracy, enhance the customer experience and streamline operations



Learn best practices for successful ERP and CRM integration and how to avoid common pitfalls



Gain insights into the positive impact of integration on customer experience, loyalty and overall business growth



Agenda

- Role of CRM & ERP
- Best practices and key trends
- Key benefits of business process integration
- Q&A session
- Wrap up

Understanding ERP & CRM Systems





SOLUTIONS

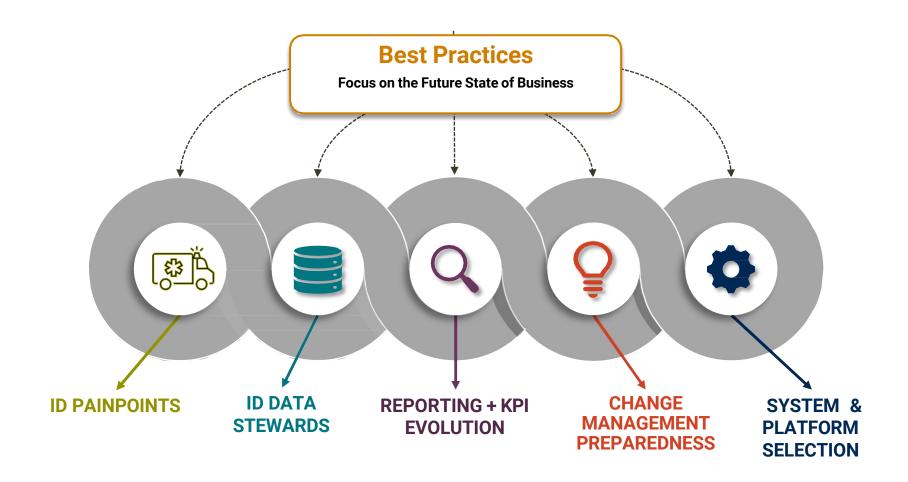
CRM & ERP

CRM		ERP	
Marketing		Financials	Banking
Sales Process(es)		Sales Fulfillment	Accounts Receivable
Customer Service		Procurement	Accounts Payable
Field Service		Production	Inventory Control
Project Management		Project Accounting	Financial Reporting
Industry Solutions		Human Capital Management	Industry Solutions

Best Practices for Successful Integration





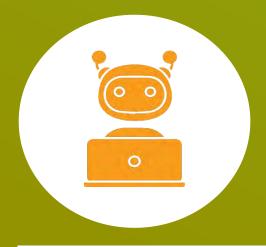






ARTIFICIAL INTELLIGENCE

Three Core Components



VIRTUAL ASSISTANT

Engaging customers and employees



ROBOTIC PROCESS AUTOMATION

Automating business processes



PREDICTIVE ANALYTICS

Gaining insight through data

Integration Focus Areas





ERP & CRM INTEGRATION FOCUS

Improved Data



ELIMINATE REDUNDACIES

- ✓ Increase in visibility across applications
- √ Say goodbye to duplicate data entry

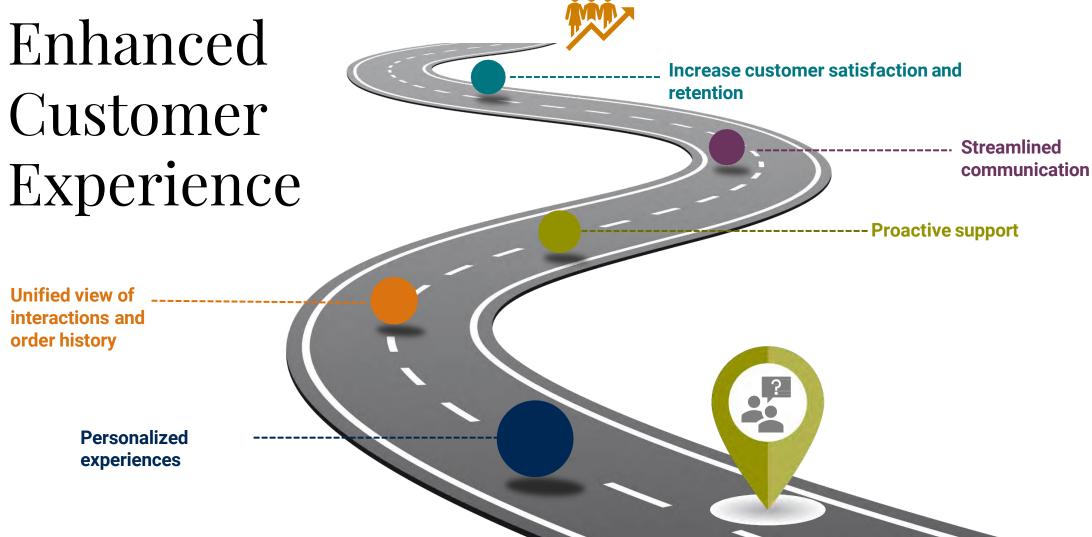
IMPROVED DATA ACCURACY

- ✓ Clear focus on business indicators
- ✓ System of record and master data management
- ✓ Conversion metrics

INCREASE EFFICIENCY











ERP & CRM INTEGRATION FOCUS

Streamlined Operations



Key Benefits of ERP and CRM Integration





INTEGRATION ELEVATES YOUR

Marketing & Lead Management

Campaigns

Visibility into what's driving sales

- ROI for campaigns, events, channels
- List segmentation
 - Journey evolution





Lead Conversion

Prioritize leads

- Predictive lead scoring
- Conversation intelligence
- Content engagement
- Acceleration tools to improve conversion

Lead Generation

Identifying and capturing interest

- · Virtual bots and form submissions
- Lead collection and source tracking
- Repeat vs. new customers





INTEGRATION OPTIMIZES YOUR

Sales Process

Master Data

Leverage shared, consistent information

- · Customers (incl. financial standing)
- Products
- Pricing





Forecasting & Reporting

Gain line of sight to what's coming

- Pipeline management
- · Sales forecasting & planning



Team Alignment & Execution

Use insights and automation to navigate opportunities

- Build relationships
- · Negotiate quotes with proper approvals
- Manage contracts and proposals



Order Automation

Accelerate order processing through integration

- Activate cross-references between CRM & ERP
- Eliminate manual data entry





INTEGRATION ENHANCES YOUR

Level of Service

1 OMNICHANNEL HUB

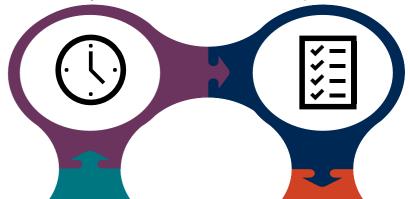
Interact with customers via phone, email, web, chat and virtual agents



2 HOLISTIC VIEW

Order and return information, deliver service quotes and capture authorization to proceed, improve team alignment and resolution execution DISPATCHING & INVENTORY

Improve service efficiency by scheduling installation upon material receipt/availability, enable inventory visibility across warehouses and auto-replenish levels



5 CUSTOMER ASSETS

Track installed/serviceable products, manage your maintenance backlog, generate a service cost analysis by asset/asset group



6 BILLING & REPORTING

Accelerate billing with automation + integration, improve accuracy of customer asset and service contract profitability analysis, improve customer retention rate, contract attach rate and revenue leakage

SERVICE CONTRACT MGMT

Visibility into service agreements and coverage details, SLA & KPI metrics, profitability analysis, automate renewals





INTEGRATION CONNECTS YOUR

Projects



Profitability estimates, billable cost and rate management



RESOURCE MANAGEMENT

Internal and subcontractors

CONTRACTS

Resource requests and bookings





PROJECT EXECUTION

Time and expense management, % complete, invoicing workflows



Forecasting





PORTFOLIO MANAGEMENT

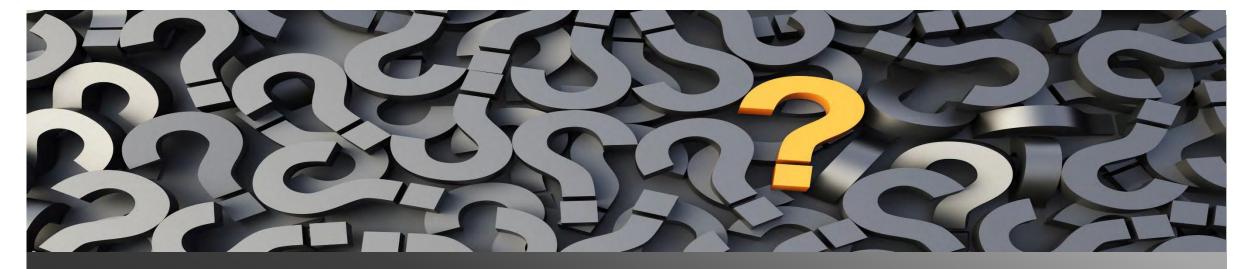
Profitability actuals to estimates

Armanino Led Virtual Classes

Whether you have new employees that need to get up to speed quickly, or simply need to learn more about the features and functionality of CRM & ERP applications, check out our <u>Armanino Academy!</u>







Questions?

Reach out to us at

experts@armanino.com





Delivering impactful, bold solutions that increase clarity and spark success for today and tomorrow.





Armanino Operates in an Alternative Practice Structure:

"Armanino" is the brand name under which Armanino LLP, Armanino CPA LLP, and Armanino Advisory LLC, independently owned entities, provide professional services in an alternative practice structure in accordance with law, regulations, and professional standards. Armanino LLP and Armanino CPA LLP are licensed independent CPA firms that provide attest services, and Armanino Advisory LLC and its subsidiary entities provide tax, advisory, and business consulting services. Armanino Advisory LLC and its subsidiary entities are not licensed CPA firms.