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Streamlining Business: ERP and CRM Integration Benefits



WELCOME

Today's Presenters



John VanMetre

Manager

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

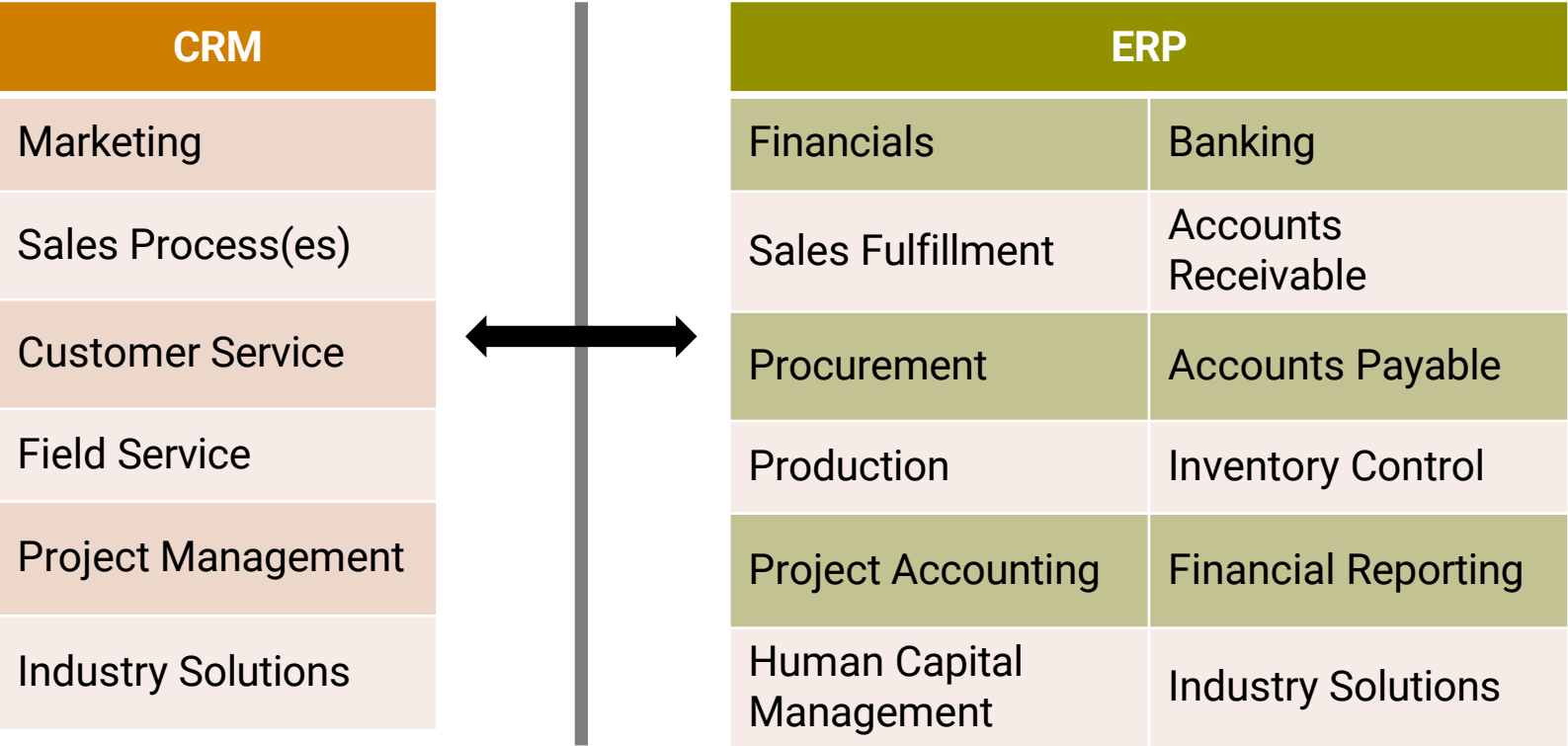
- Role of CRM & ERP
- Best practices and key trends
- Key benefits of business process integration
- Q&A session
- Wrap up

Understanding ERP & CRM Systems



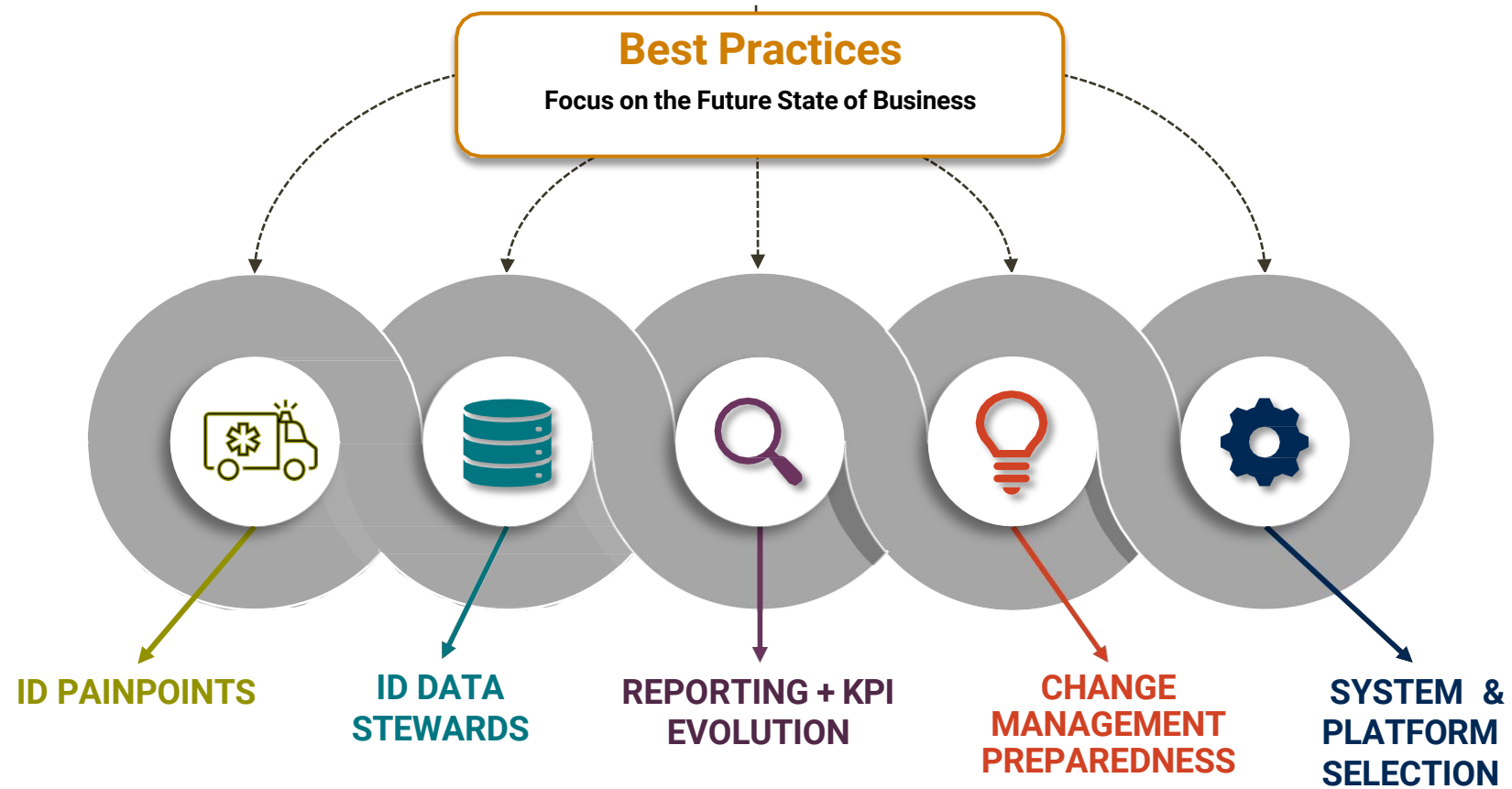
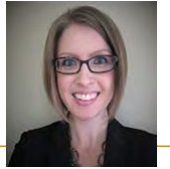
SOLUTIONS

CRM & ERP



BETTER TOGETHER

Best Practices for Successful Integration





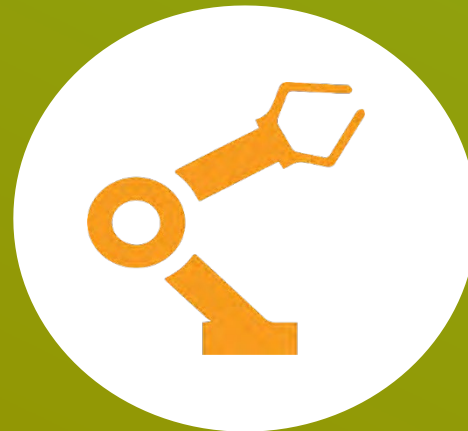
ARTIFICIAL INTELLIGENCE

Three Core Components



VIRTUAL
ASSISTANT

Engaging customers
and employees



ROBOTIC PROCESS
AUTOMATION

Automating business
processes



PREDICTIVE
ANALYTICS

Gaining insight through
data

Integration Focus Areas

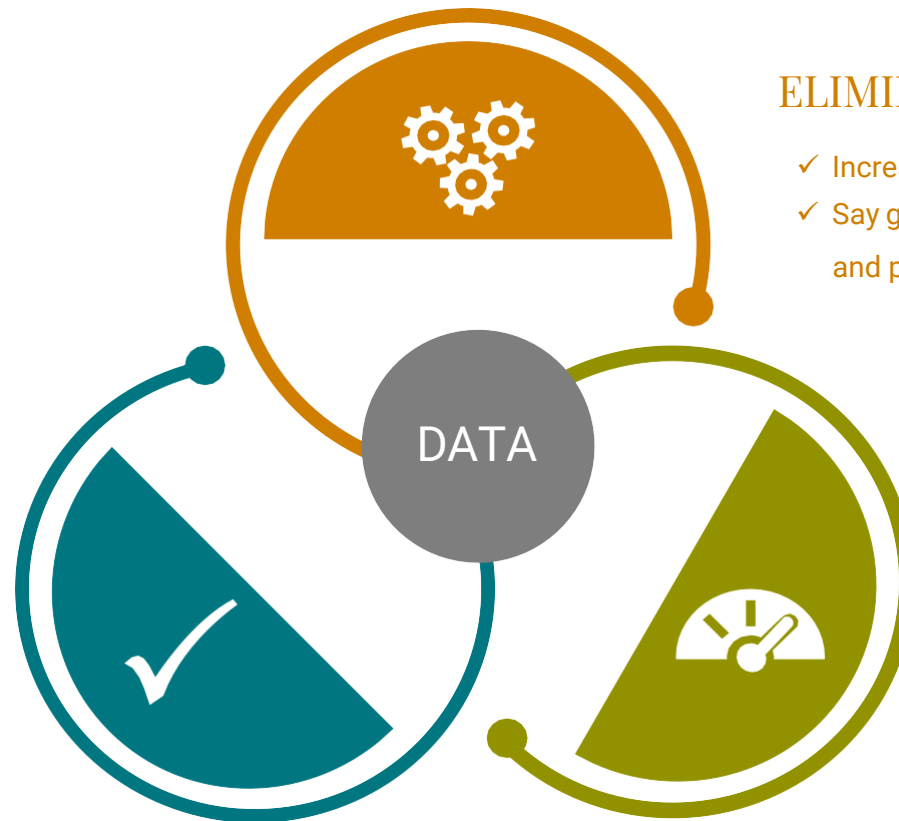


ERP & CRM INTEGRATION FOCUS

Improved Data

IMPROVED DATA ACCURACY

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



ELIMINATE REDUNDACIES

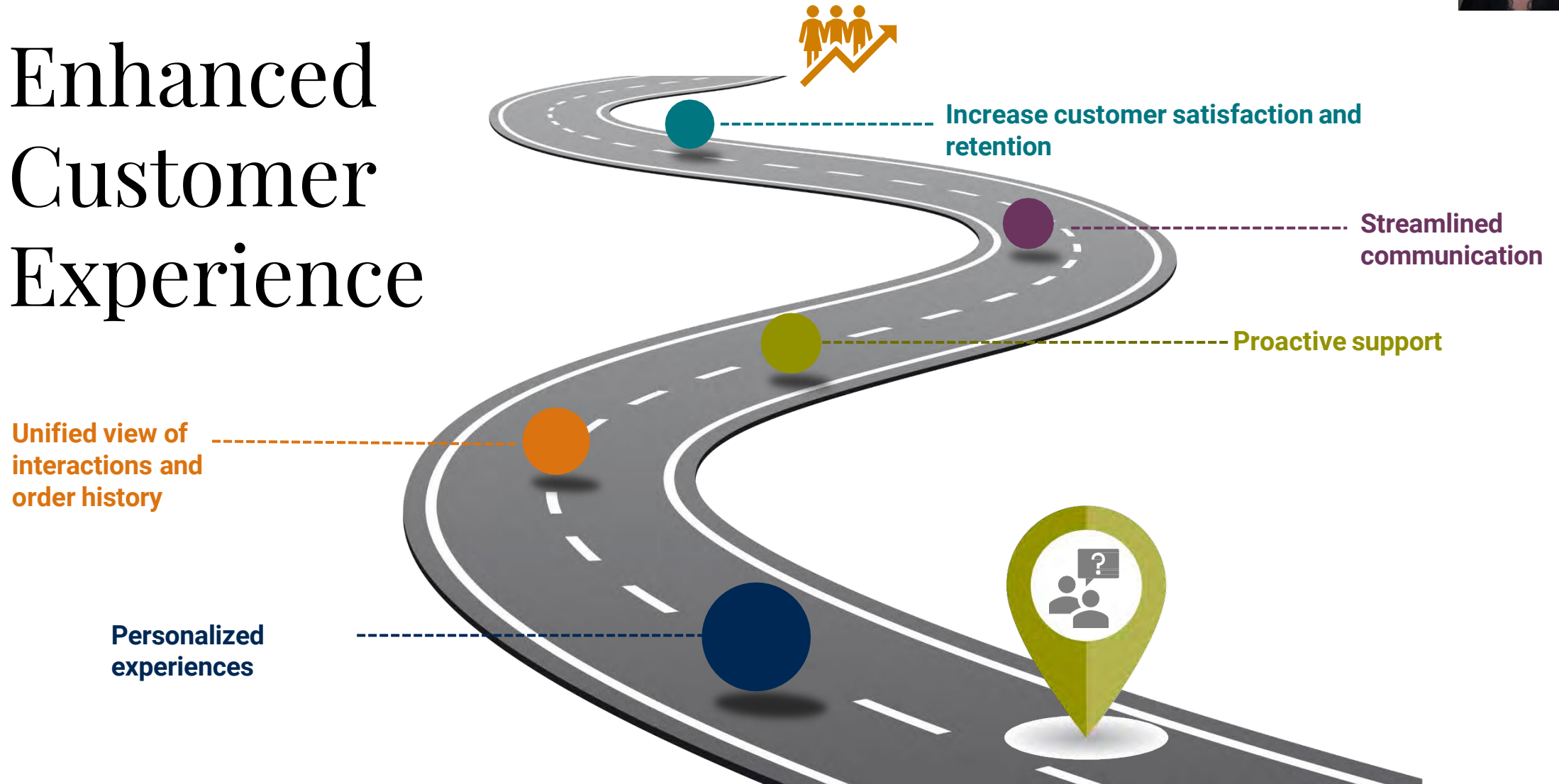
- ✓ Increase in visibility across applications
- ✓ Say goodbye to duplicate data entry and processing

INCREASE EFFICIENCY

- ✓ Business process automation



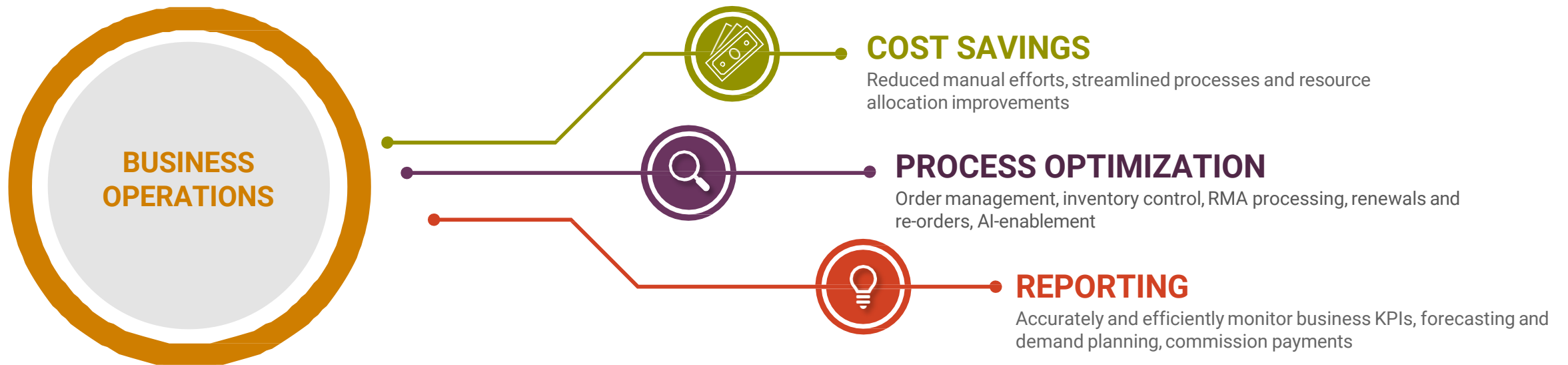
Enhanced Customer Experience





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

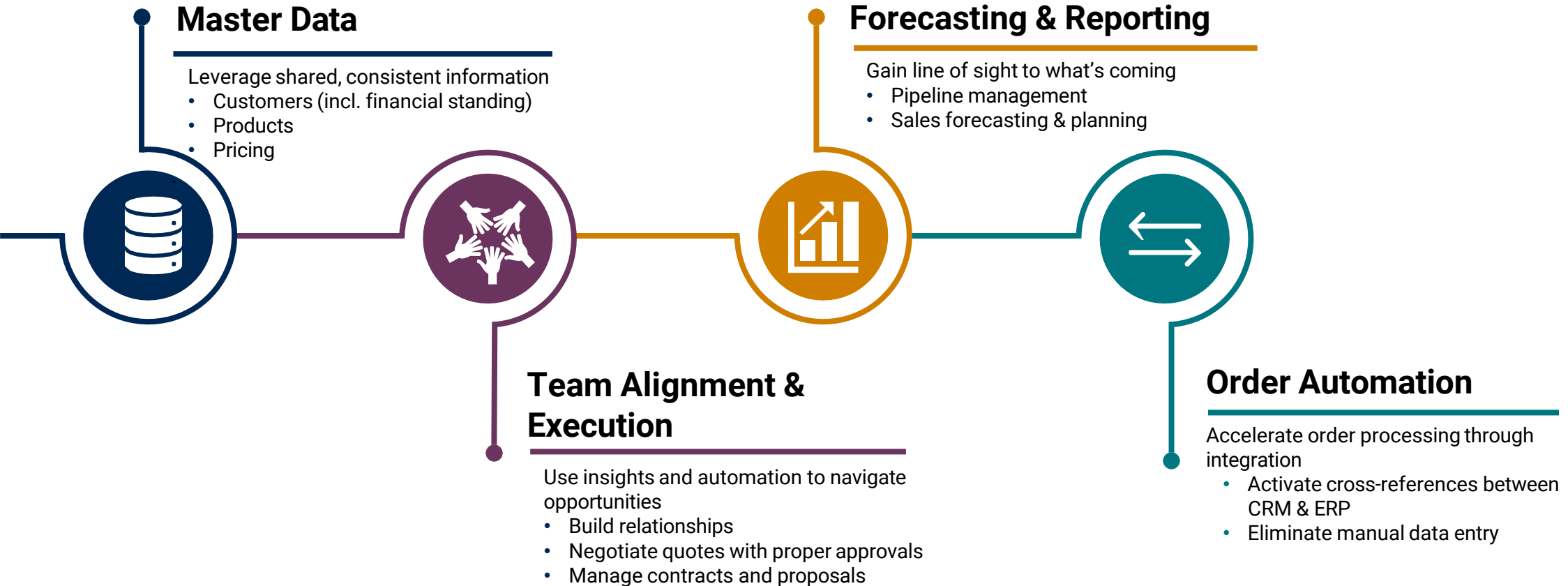
Lead Generation

Identifying and capturing interest

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



INTEGRATION OPTIMIZES YOUR Sales Process





INTEGRATION ENHANCES YOUR Level of Service

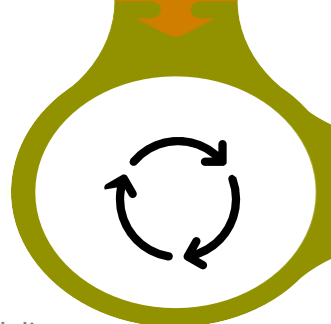
1 OMNICHANNEL HUB

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



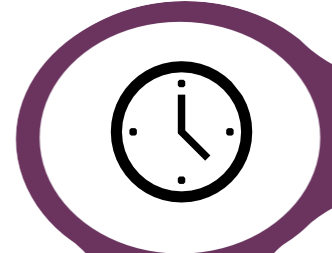
2 HOLISTIC VIEW

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



4 DISPATCHING & INVENTORY

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



3 SERVICE CONTRACT MGMT

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



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





INTEGRATION CONNECTS YOUR

Projects



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 [Armanino Academy](#)!





THANK YOU FOR ATTENDING

Questions?

Reach out to us at

experts@armanino.com

Possible *(Re)Defined*™

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

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