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# Information Technology Policy

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## *Customer Management Applications Policy*

<b><i>ITP Number</i></b> ITP-APP025	<b><i>Effective Date</i></b> March 23, 2009
<b><i>Category</i></b> Recommended Policy	<b><i>Supersedes</i></b>
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**This Information Technology Policy (ITP) establishes enterprise-wide standards and policies for customer relationship management applications as part of the Commonwealth's Enterprise Resource Planning (ERP) system.**

### 1. Purpose

The purpose of this Information Technology Policy (ITP) is to establish enterprise-wide standards and policies for Customer Relationship Management (CRM). Establishing standards will provide guidance to agencies as they plan for new application development projects or make investments in existing applications.

### 2. Background

CRM software entails all aspects of interaction a company has with its customer, whether it is sales or service related. CRM allows marketers to gain the essential business insights needed to make intelligent decisions, focus on customers to drive demand, and increase customer retention. It also facilitates a better way to manage marketing resources to do more with less.

CRM solutions provide the following capabilities:

- Align marketing resources to support organizational objectives
- Understand the returns on marketing spending
- Accelerate marketing processes with increased visibility and control
- Drive customer demand with targeted marketing messages
- Identify and retain high-value customers with customer loyalty programs

- Establish a standard, streamlined marketing process with a central marketing platform

### 3. Scope

This Information Technology Policy (ITP) applies to all departments, boards, commissions and councils under the Governor’s jurisdiction. Agencies not under the Governor’s jurisdiction are strongly encouraged to follow this ITP.

### 4. Policy

Agencies requiring new or updating existing CRM applications are to leverage the CRM solution available from Integrated Enterprise Systems (IES) when the IES customer relationship management solution meets the agencies’ business requirements. Current standards and product availability are in sections 5 and 6 of this ITP.

Agencies are to analyze their CRM business requirements and assess the business value of integration and exchange of information with the Commonwealth’s Enterprise Resource Planning (ERP) system. ERP applications include financial, human resources, customer relationship management, supplier relationship management, platform life cycle management, supply chain management, and material management enterprise applications.

Agencies are to analyze their CRM data warehousing and business intelligence requirements and assess the business value of utilizing the Commonwealth’s ERP data warehouse and business intelligence platform.

### 5. Standards

#### CURRENT STANDARDS

(These technologies or products meet the requirements of the current architecture and are recommended for use.)

Technology	Platforms	Technology Classification
<p><b>SAP Customer Relationship Management (CRM)</b></p> <ul style="list-style-type: none"> <li>• Marketing                             <ul style="list-style-type: none"> <li>○ Marketing Planning</li> <li>○ Customer Segmentation</li> <li>○ Product Management</li> <li>○ Campaign Management</li> <li>○ Lead Management</li> <li>○ Marketing Analytics</li> <li>○ Personalization</li> </ul> </li> <li>• Sales                             <ul style="list-style-type: none"> <li>○ Sales Planning &amp; Forecasting</li> <li>○ Organization &amp;</li> </ul> </li> </ul>	<p>All</p>	<p>Current</p>

Technology	Platforms	Technology Classification
<ul style="list-style-type: none"> <li>○ Territory Management</li> <li>○ Account &amp; Contract Management</li> <li>○ Task &amp; Activity Management</li> <li>○ Opportunity Management</li> <li>○ Contract Management</li> <li>○ Quotation &amp; Order Management</li> <li>○ Sales Analytics</li> <li>● Field Service                             <ul style="list-style-type: none"> <li>○ Mobile Service</li> <li>○ Mobile Service for Handheld</li> </ul> </li> <li>● Field Sales                             <ul style="list-style-type: none"> <li>○ Mobile Sales</li> <li>○ Mobile Sales for Handheld</li> </ul> </li> <li>● Service                             <ul style="list-style-type: none"> <li>○ Service Planning &amp; Forecasting</li> <li>○ Customer Service &amp; Support</li> <li>○ Resource Planning &amp; Optimization</li> <li>○ Service Operations Management</li> <li>○ Service Analytics</li> </ul> </li> <li>● Interaction Center (Call Center)                             <ul style="list-style-type: none"> <li>○ Sales</li> <li>○ Service</li> <li>○ Marketing</li> <li>○ Analytics</li> </ul> </li> <li>● E-Commerce                             <ul style="list-style-type: none"> <li>○ E-Selling (Internet Sales) including Internet Pricing &amp; Configuration</li> <li>○ E-Service</li> <li>○ E-Marketing</li> <li>○ Web Analytics</li> </ul> </li> <li>● CRM Analytics                             <ul style="list-style-type: none"> <li>○ Customer Behavior Optimization</li> <li>○ Customer Profitability Optimization</li> <li>○ Product &amp; Pricing Optimization</li> </ul> </li> <li>● Channel Management</li> </ul>		

Technology	Platforms	Technology Classification
<ul style="list-style-type: none"> <li>o Channel Marketing</li> <li>o Channel Sales</li> <li>o Channel Service</li> <li>o Channel Commerce</li> <li>o Partner Management &amp; Analytics</li> </ul>		

**CONTAIN**

(These technologies or products no longer meet the requirements of the current architecture and are not recommended for use. They are to be phased out over time. No date has been set for their discontinuance.)

Technology	Platforms	Technology Classification
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**RETIRE**

(These technologies or products are being phased out. Plans are to be developed for their replacement, especially if there is risk involved, such as lack of vendor support. A date for retirement has been set.)

Technology	Platforms	Technology Classification
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**EMERGING / RESEARCH**

(Emerging technologies or products have the potential to become current standards. At the present time, they are to be used only in pilot or test environments where they can be evaluated. Use of these technologies is restricted to a limited production mode, and requires approval of a waiver request. Research technologies are less widely accepted and time will determine if they will become a standard.)

Technology	Platforms	Technology Classification
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**6. Product Availability**

Customer Relationship Management Product Availability	
Product/Module	Status
SAP Customer Relationship Management (CRM)	

<b>Marketing</b>	
Marketing Planning	Available
Customer Segmentation	Available
Product Management	Available
Campaign Management	Available
Management	Available
Marketing Analytics	Available
Personalization	Available
<b>Sales</b>	
Sales Planning & Forecasting	Available
Organization & Territory Management	Available
Account & Contract Management	Available
Task & Activity Management	Available
Opportunity Management	Available
Contract Management	Available
Quotation & Order Management	Available
Sales Analytics	Available
<b>Field Service</b>	
Mobile Service	Available
Mobile Service for Handheld	Available
<b>Field Sales</b>	
Mobile Sales	Available
Mobile Sales for Handheld	Available
<b>Service</b>	
Service Planning & Forecasting	Available
Customer Service & Support	In Production
Resource Planning & Optimization	Available
Service Operations Management	Available
Service Analytics	Available

## 7. Related ITPs/Other References

## 8. Authority

- Executive Order 2011-05, Enterprise Information Technology Governance

## 9. Publication Version Control

It is the user's responsibility to ensure they have the latest version of this publication. Questions regarding this publication are to be directed to [RA-itcentral@pa.gov](mailto:RA-itcentral@pa.gov).

This chart contains a history of this publication's revisions:

Version	Date	Purpose of Revision
Original	3/23/2009	Base Document
	10/25/2010	ITB Refresh
	4/2/2014	ITP Reformat; Merged GEN-APP025B, STD-APP25A into ITP