

BPMonline Spotlight Report

By Raluca Druta
www.technologyevaluation.com

SPOTLIGHT REPORT

BPMonline Spotlight Report

"I am sure that in the next few years, positive customer experience will be the most important business driver. Therefore, the vast majority of companies will reorient their business processes toward delivering the best customer experience possible. And this is when companies will have to learn how to capture best practices and distribute them to all their teams and staff. A business process management (BPM) approach helps to put on the wheels on these practices and enables you to drive innovations on a regular basis. I strongly believe that the synergy of customer relationship management (CRM) and BPM brings exceptional value to software users, and this process-oriented approach in customer experience strategy will dominate the following decade."

Andy Dovgan, Business Development Manager, BPMonline

Company Background

Founded in 2002, BPMonline is headquartered in the United Kingdom (UK), with presence in more than 35 other countries. In its early days, the company set out to produce technology that automates customer relationship management (CRM) organizational processes. Today, BPMonline offers a rather rare product within the CRM market—that is, a process-based CRM solution. Organizations using BPMonline products can place customer satisfaction in a central position when defining internal and external processes, and corporate values and goals.

BPMonline products attract customers from various industries and sizes. Today, about 300,000 users within 5,000 organizations across the globe use BPMonline applications.

While BPMonline caters to the CRM market and competes against well-known products such as Oracle Siebel CRM, SAP CRM, Microsoft Dynamics CRM, and Salesforce CRM, its direct competitors are vendors offering similar process-based CRM products, such as Pega Systems and Sword-Ciboodle (acquired by KANA).

BPMonline delivers process management for CRM functions by combining CRM's main modules (contact management, sales, service management, and marketing automation) with business process management (BPM). One of the main qualities of a process-based CRM solution is that it allows for the constant creation, testing, and modification of business processes for sustaining customer-related activities.

The product includes a drag-and-drop customization capability that allows users to perform changes in the system without having to involve information technology (IT) specialists. In addition, customers get an open configuration and therefore do not rely on the vendor for making changes to the system.

The solution can be deployed on premises or on demand. The on-demand option implies a pay-as-you-go model which includes free updates and support. The application is hosted at the data centers of a certified hosting provider. The on-site deployment involves a onetime payment and lifetime license for the application. In this case, companies have to host BPMonline on their own servers.

Although a BPM system is considered a luxury that only large organizations can afford, BPMonline acknowledges that all organizations (including small to medium businesses [SMBs]) require processes to eliminate errors and speed operations. Large enterprises need to not only communicate with large communities of clients, but also properly understand each client to ensure personalized interactions—thereby necessitating the automation of customer-related activities. Although SMBs tend to have more intimate relationships with their fewer customers, they still need process-based CRM to facilitate the sharing and accurate management of information across all of their departments, from sales to marketing, to customer support, to product development.

BPMonline's market strategy echoes the increasing market demands for CRM plus BPM, as well as for ensuring pleasant customer experiences. The vendor delegates business analysts to identify a customer's CRM needs and to guide its clients to the best combination of BPMonline functionality. Due to the flexibility of its product, BPMonline caters to a wide range of industries (e.g., legal, private investment, real estate, banking, distribution, advertising, retail, and telecommunications). Midsize companies and large corporations requiring 50+ licenses make up the vendor's preferred market segment. BPMonline targets organizations that are located mainly in Europe, the UK, United States, and Canada.

BPMonline developed a partner network which allows for its product to be present in more than 35 countries worldwide. The company works with value-added resellers (VARs), independent software vendors (ISVs), and consulting firms.

BPMonline Follows the BPMN Standard

Having a constant—10-year-old—presence in the business software market, BPMonline has accumulated expertise regarding business process automation. The company has designed a Web-based platform which includes a BPM engine based on the Business Process Model and Notation (BPMN) standard.

BPMN has the quality of rendering business process design accessible to all individuals involved with it, be it technical or business users. BPMN has been developed by Object Management Group, a not-for-profit computer industry standards consortium. The standard facilitates business process modeling through easily readable graphical notations that represent intricate business processes. By following the BPMN standard, BPMonline ensures consistent communication between designers and implementers of business processes.

There are two main levels of BPM features for the BPMonline platform: the user/business analyst level and the technical level, with the goal of adding as many functions as possible to the user level (such as process designer, business rules designer, user interface [UI] designers, analytics tools, etc.).

BPMonline is a system that integrates data from various applications (such as , enterprise resource planning [ERP], and business intelligence [BI]) that serve distinct purposes within an enterprise. Following the BPMN standard makes the collaboration between very different business areas not only feasible, but also seamless.

BPMonline has all the components of a typical BPM solution: process designer, execution module (code generation and compilation modules), and UI designer. Based on the BPMN standard, the **process designer** eliminates coding from the business rules definition, adopting a WYSIWYE (What You See Is What You Execute) approach. The solution also provides various display options (built-in tools for visual design of forms, sections, and business objects) as well as functionality to support data filtering and access.

Furthermore, upon modeling complex business tasks that may require programming, BPMonline comes with built-in integrated development environment (IDE) and well-known technologies such as .Net framework. However, most stakeholders can customize most of the business objects without any coding.

BPMonline's New User Interface

BPMonline has recently introduced a new UI (see figure 1) to its process-based CRM software solution. In essence, the new UI offers a simple and clean design which allows users to easily locate its main components (i.e., processes, leads, accounts, contacts, activities, etc.).

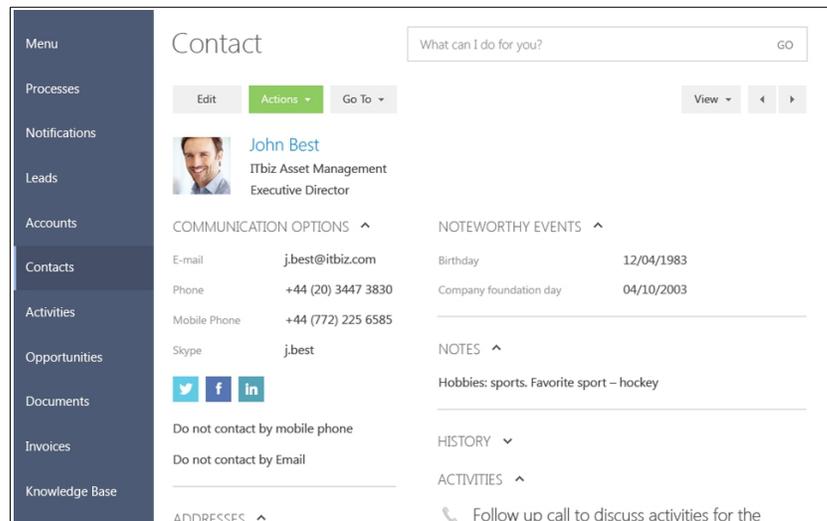


Figure 1

In addition to the clean exterior, the system also proposes a cleaner approach to information handling. With version 7.0, BPMonline becomes a platform that sustains dynamic data upload, allowing system actions and processes to be performed faster than before.

Furthermore, the system is able to display only the information that is needed to support the task at hand while hiding unnecessary details. In fact, the solution allows companies to set up what data is necessary for what task. For example, while working on an opportunity, a user may only need a list of appropriate products for a cross-sell and a list of discounts.

Also, the company's concerns to accommodate mobile diversity constitute another aspect that is reflected by the new UI. BPMonline listened to the customer voice, and understood that for most users switching from one device to another can be challenging if the desktop and mobile applications are dramatically different. Customers want to avoid having to learn a completely new application, or ensure training sessions for their employees before they can adopt mobile features. Users can indeed bring their own device and have the same working experience that they have on a laptop or desktop, as the menus and features are simply adapted to the device and not completely redesigned.

Moreover, the 'what can I do for you' command line functionality has been introduced to facilitate the access of CRM data and functions. For instance, opening the pages, searching and adding new records, or any other setting can be controlled with command line. BPMonline attempts to eliminate a lot of manual work with a CRM system from the day-to-day work of customer-facing employees. When a command such as 'call customer' is invoked, the appropriate action is performed by the system without having the user perform additional clicks or browse to different pages.

Unfolding CRM Plus BPM

The core component of BPMonline is BPM engine, which ensures process modeling and execution for multiple facets of customer-related activities: customer data management, sales management, marketing automation, customer service and support, CRM extensions, and dashboard and analytics. (See figure 2 for an example of an activity.)

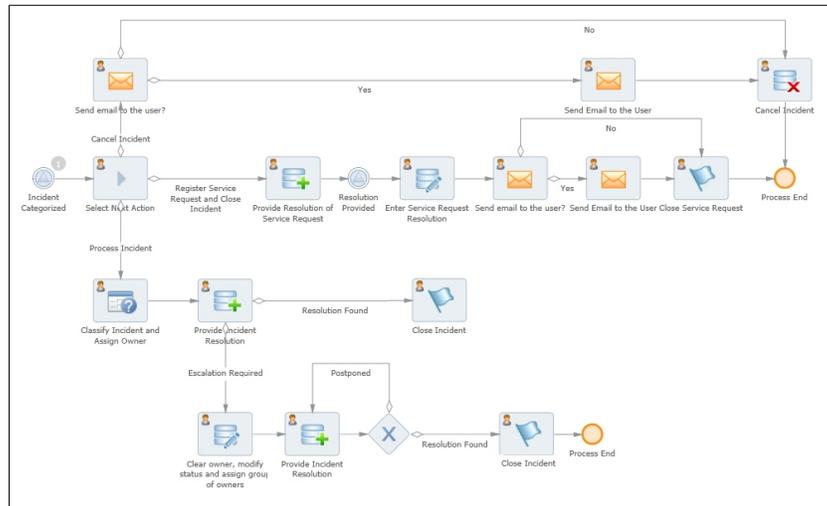


Figure 2

Customer Data Management

Customer data is a critical component of a CRM system, as it plays an indispensable role in managing client relations. Associating opportunities with contacts, invoices, campaigns, competitors, etc., would be unattainable were it not for a strong and well-defined system of records. BPMonline's *account management* functionality handles data of the entities a company engages with (customers, partners, vendors, and competitors). Moreover, the system allows for setting up relationships between different accounts, such as partnership, distribution, etc.

The multi-dimensional display of account profiles includes custom fields on top of the standard fields. Users can store historical information about meetings, mailings, and calls on each account. In addition, from a security perspective, access to sensitive information can be granted or revoked based on the privileges of each user. From an administrative perspective, BPMonline can handle such customer segmentation. Users can view groups of customers through various filters based on their requirements.

Furthermore, *contact management* functionality enables capturing very comprehensive customer information: location, time zone, industry, address, communication options, job experience, noteworthy events, and social media interactions. The solution also includes an automatic search for duplicates whenever a new record is created. Reporting tools allow for generating a summary and statistics about contacts.

Activities, a BPMonline feature, enables a company to obtain a cohesive perspective into the engagement of its customers. All important activities (e.g., tasks, e-mail messages, or calls) related to an account can be managed from a single view that can be accessed directly from the *account or contact* windows.

Sales Management

Sales representatives have several options for understanding the context of sales deals. As deals do not occur in a void—i.e., competitors and other obstacles (such as insufficient information) are present, BPMonline can be used to present a picture of the entire context surrounding a sale. Users can do the following:

- link opportunities to sales channels, campaigns, invoices, etc.,
- segment opportunities (by type, stage, priority, sales channel, origin, etc.),
- store a competitor's information (such as strengths, weaknesses, and strategy) as part of an opportunity, and
- specify the roles of the individuals that are involved in the buying process.

In addition, sales teams can share experiences and resources or set rules to identify approachable and receptive customers. BPMonline offers the capability to:

- manage proposals,
- generate quotations directly from the system using a centralized quotation management tool, which contains information on products, as well as their availability and cost in a selected currency,
- automate the document flow for opportunities (contracts, purchase orders, invoices, etc.),
- modify the UI to prevent sales reps from performing undesired actions, and
- automatically or manually assign a territory to a sales representative.

Moreover, the solution's BPM engine allows for automation of sales processes, such as the allocation of new opportunities to available sales representatives or collaboration among the individuals across the enterprise involved in the sales process. In addition, multichannel communication can be included within the same process. The solution also allows for the monitoring and continual adjustment of business processes. For instance, if new requirements determine a new business rule, BPMonline users can modify or expand existing rules.

Marketing Automation

Campaign management functionality handles the process of campaign organization (budget planning, targeting, tracking responses, and associating a sale with its original source (i.e., the person involved in the lead creation). Workflows that streamline processes, approvals, and alerts and reminders can be used to manage campaigns. The application allows the definition of target audience lists, which can be associated to campaign messages, offers, etc. This may include a marketing encyclopedia or knowledge base that hosts a company's marketing material and that can be searched to locate documents.

Bulk mail campaigns are supported by a set of mass e-mailing capabilities, such as using macros for text e-mails, building e-mailing lists by adding a group of

contacts, removing subscribers from mailing lists, and using embedded mail-merge capabilities. BPMonline CRM also integrates with MailChimp—another mass mailing solution to handle the blast of large volume email campaigns.

Lead management functionality can be defined as a process that covers the entire lead movement cycle, from lead acquisition, qualification, allocation to sales reps, etc. BPMonline allows users to retrieve leads from the Web and qualify them before starting the customer nurturing or sales process. In addition, for companies working with lead information providers, the system includes an MS Excel integration bus, which ensures that data can be uploaded from any source by exporting it into MS Excel and then importing it into BPMonline. The solution performs automatic searches to avoid lead duplication or disqualify leads with insufficient information. Users can track leads by any criteria, or instantly filter leads by applying preconfigured filtering criteria.

Customer Service and Support

Incident management takes advantage of the BPM engine to handle the entire incident lifecycle—beginning with detection and recording, classification and initial support, escalation and investigation, and ending with resolution and analysis. Solutions and best practices can be stored in a searchable knowledge base. The system stores profiles which contain fields such as synopsis, incident number, registration date, serial number, classification (e.g., status, priority, urgency, type, category, or product), current status, and resolution and closure. Incidents can be linked to contacts, accounts, opportunities, as well as equipment. Furthermore, incidents can have subordinate incidents.

BPMonline Agent Desktop is an application that offers an all-in-one call center environment where service engineers can gain access to a consolidated view of the customer—including the customer's segment, satisfaction, and loyalty—and communicate via multiple channels such as phone, e-mail, self-service portals, and social media. Customer requests can be described in great detail and linked to knowledge base articles. The application allows for processing a customer's request and even automatically proposes an agent and an appropriate follow-up action.

BPMonline supports *customer feedback management*, allowing for the collection of customer opinions via multiple channels (in-person, phone, surveys, e-mail, Web, social networking, mobile devices, and more), and in a variety of formats. Feedback is typically obtained as a result of an event—e.g., following a conversation with a customer—and can be used to monitor quality of service provided to the customer. BPMonline allows users to automate periodic or ad hoc customer satisfaction surveys. Furthermore, it allows for setting up alerts based on specific rules. For example, if the quality of customer feedback is under an acceptable level threshold, appropriate agents can be notified.

CRM Extensions

Document management functionality allows companies to automate document processing by adding workflows to ensure the accuracy of content. The solution allows for the management of a variety of documents. Users may create and modify document templates in MS Word. BPMonline includes tools for managing, printing, and tracking invoices. Documents repositories can be created based on each department's needs: marketing, technical support, sales, etc.

Time management functionality allows for tracking the time spent on tasks, calls, or e-mails. A time zone-adjusted calendar helps users keep track of recurring tasks, team tasks, and high-priority tasks. In addition, users can monitor time and activities for each customer, partner, and supplier. BPMonline integrates with Google Calendar, among other schedulers.

Project management is an atypical CRM functionality which BPMonline includes in its suite of products. Users can set project deadlines, manage project costs, assign tasks to responsible employees or teams, as well as monitor progress on each task.

Dashboards and analytics can help companies measure and visualize results of CRM-related activities. Dashboards can be customized to display summaries of relevant information, in real time. The BI module that comes with the solution contains report builder and user tools for creating charts and managing data views. In addition, BPMonline's BI module can be integrated with external BI tools such as SAP Business Objects, among others.

Sales Dashboards and Analytics

BPMonline CRM provides sales teams with various sales analytics tools, including standard and custom reports, or real-time and historical data in a tabular format. The system allows users to reveal hidden trends or discrepancies, as well as summary data on opportunities. A user can view the distribution of opportunities by responsible sales rep, and then analyze data on competitors, or prepare the summary of the opportunity. For example, the sales pipeline report indicates where deals are at in the sales cycle. Or supervisors can view workloads, completed or incomplete activities, as well as who is in charge of which tasks—i.e., presentation or quote preparation, follow-up e-mail or call, etc.—based on the charts present in the *Activities* tab.

Marketing Dashboards and Analytics

Companies can use BPMonline analytics to calculate return on investment (ROI) and consequently view the most successful marketing projects. DevExpress Report Builder is one tool of the system that allows a user to define relevant charts and reports that unveil outcomes of campaigns as well as the success of consumer targeting. Users can customize charts by including aggregated values

such as sum or max. Similarly to monitoring sales activities, users can view and optimize marketing activities as these events unfold.

Customer Service and Support Dashboards and Analytics

The effectiveness of service teams can also be monitored in reports and charts that display resolved tickets, customer satisfaction, average response rate, etc. Managers can build either tabular or graphical service reports based on real-time and historical data. In addition, they can take advantage of dashboards, where they can add charts, lists, statistics, etc., to view the activities of their team members.

Product Highlights

BPMonline positions its product as being *process oriented* and *highly customizable*, and yet *affordable*.

BPMonline CRM is built on a process-driven platform that targets a number of verticals, such as real estate, telecommunications, banking, legal, etc. Its more than 10 years of experience have allowed it to develop best practices and industry-tailored solutions to address the specific demands of its clients.

BPMonline recognizes that managing customer relationship and experience relies on processes that run across departments. The sales, marketing, and service flows may break if processes are not automated. In addition, processes change continuously, as businesses are growing or shrinking, and therefore processes need to be easily altered, or adapted. BPMonline allows users to change processes as they develop, in real time.

The vendor designed *BPMonline Service Desk* (software aimed to automate companies' service processes) and *BPMonline Agent Desktop* (intelligent contact center software), which include core features that are common requirements to most businesses of any size and in any industry. In addition, the system has a user-friendly interface that integrates with popular tools such as MS Outlook, Google Apps, QuickBooks, and various other Web services.

The BPMonline architecture and platform is friendly to third-party vendors looking to expand it with other applications—thereby inheriting all the benefits of this process-driven platform. Third-party developers can benefit from a professional IDE that enables them to create and configure applications on the BPMonline platform. Popular technologies such as HTML5 are employed so that developers can create optimal interfaces. Also, the BPMonline service-oriented architecture (SOA) ensures the alignment of the application with the needs of the business.

Furthermore, BPMonline provides mobile support for native applications (Android 2.2+ and iOS 5.0+) and HTML5 mobile browser application (see figure 3).

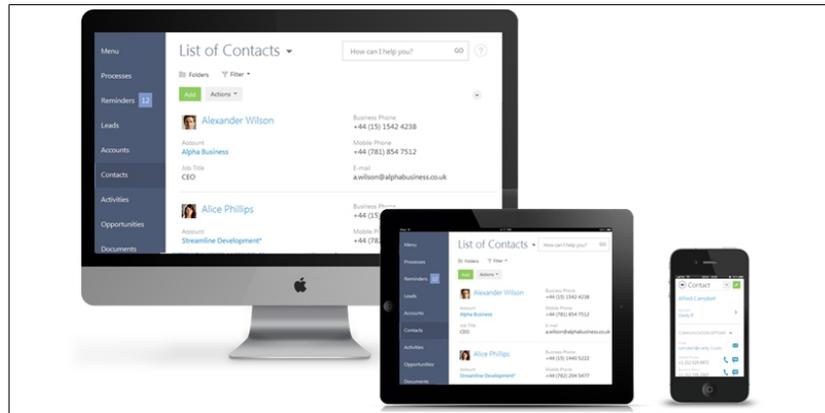


Figure 3

Key BPMonline Mobile CRM features include the following:

- Synchronization of contacts, accounts, leads, activities, etc., across computers and mobile devices
- Remote access to critical customers', partners', vendors', and competitors' information
- Management of calls, messages, and e-mails
- Provision of reminders and alerts on tasks, appointments, and events
- Provision of advanced search functions

The product is complemented by after-sales services which render the implementation and utilization easier for its clients. BPMonline offers Customer Success Manager, a free-of-charge service designed for customers, which ensures that customers are being contacted on a regular basis to confirm that customer requirements are met and that the customer understands how to use the system. In fact, BPMonline keeps in touch with its customers to make sure that system's key modules are being utilized and that its multitude of features is taken advantage of by its customers.

Another competitive advantage of BPMonline CRM is the price. The cloud-based BPMonline CRM is offered at \$35 per month per user, and it is a way to start using the system without having to install it on premises. In addition, the software-as-a-service (SaaS) package includes all upgrades as well as customer support.

BPMonline—The User Perspective

SpecTec is a group of companies specialized in offering asset management software and services across the globe. The company was interested in acquiring a

CRM and project management solution to centralize and improve its sales across 16 countries. SpecTec was dealing with very complex industry demands where it had to find customers very early on, in its business development process. The company was uncertain that an off-the-shelf solution for that even existed. After fruitlessly prospecting for such a solution on the market, it was ready to develop an in-house solution.

BPMonline was capable of offering SpecTec a set of initiatives, approaches, and software solutions designed to streamline customer relations management and overall workflow. The solutions considered were management solutions for obtaining complete and up-to-date input of customer information, leads information, sales, partners, and employees.

Eventually, SpecTec received an integrated and user-friendly solution for all its staff, allowing unification of disparate data in a single place, streamlining internal and external work processes, improving the work of the sales department, managing sales budgets, and enhancing the overall customer experience. The implementation of BPMonline CRM allowed for consolidating all the data from each site into a single report for managing directors and chief executive officers, as well as for developing a common approach to customer management and delivery, and meeting key performance indicators (KPIs).

What helped both meet and exceed customer expectations is the fusion of CRM and BPM tools, which allowed for designing, executing, testing, and continually improving automated processes. As SpecTec continues to grow its business and hence number of its processes, SpecTec sees the standardizing of methodology as fundamental to business success.

BPMonline offered a platform that enabled creating, managing, and continually modifying processes for CRM and project management. The process-based BPMonline CRM was easily customizable as well as intuitive and easy to use by all staff. The platform provided a complete set of tools to fine-tune an application. An agile UI modification toolbox—an architecture for developing new features without coding—allows users to modify all interfaces to meet specific requirements.

This single solution with combined CRM and project management functionality could be used across the entire organization to continually improve overall processes—from initial sales prospecting to managing customer implementation and delivery.

A Final Word: Beyond CRM Plus BPM

Customers looking into buying a process-based CRM solution should be aware of how CRM and BPM functionality intertwine as well as understand its main virtues. In principal, CRM solutions typically are devoid of robust and automated

processes. Automating processes eliminates broken links among the various parties involved in managing the customer relationship. The process-driven BPMonline CRM solution includes a set of applications for business process management, including process design, execution, monitoring, and analysis.

The main potential benefits of a process-based CRM product are:

- automating routines,
- eliminating extra steps and possible human errors from certain tasks,
- introducing and automating new processes,
- changing processes on the fly,
- applying processes across the business, and
- ensuring smooth collaboration between departments and business units.

Furthermore, prospects should have an understanding of the perils hovering over any software product acquisition and implementation. It is well acknowledged that one major reason for the failure of many CRM implementations has to do with people's disinterest in undertaking the efforts implied by the process.

Nowadays, the shift to customer-focused enterprises may imply major conceptual and routine changes, which may be experienced as discomfort by employees and the organization at large. Nonetheless, if the software vendor is committed to sustaining the individuals directly involved with using the product and building the overall CRM strategy, then the desired customer-centric attitude can be nurtured as the implementation unfolds.

In addition, some companies may fear that deploying CRM may incur large costs. BPMonline CRM does not require capital investment due to flexible pricing packages. Companies may choose between a onetime license and small monthly payments. The latter eliminates large expenses during the early stages of the system implementation.

However, the most common challenge that BPMonline faces is lack of knowledge about the potential benefits of CRM systems on the part of the businesses prospecting for customers on the market. Some businesses still use CRM as a system of records and disregard its many sophisticated features. To serve this need, BPMonline introduced the Customer Success Management (CSM) department.

To this end, BPMonline's CSM team provides lifetime guidance to ensure that BPMonline is fully understood and used to its maximum capacity. The CSM team goes beyond the typical customer service and support team that provides with resolution of temporary technical issues—it constantly engages customers to ensure that the system's key modules or specific features are used and that BPMonline is helping the company get closer to achieving its business goals.

And, furthermore, beyond CRM and BPM user adoption issues, BPMonline's new UI promotes the product into the social business arena, as it integrates with major social platforms, and it will soon support online communities for customer-contributed knowledge bases and idea generation.

The new interface translates all BPMonline functionality—from system of records to social engagement and process automation—into a more usable format. Gamification features will be added in the near future to better represent the performance of customer-facing employees. Gamification can be used to award points to employees whenever they display a desirable behavior or meet expectations. These points can be publicly shown on an employee's profile.

Conclusion

BPMonline's process-based CRM solution facilitates the design and execution of customer relationship management processes. Users can define detailed sets of actions and activities that run across departments—such as placing a customer call or qualify a lead—and further use the CRM solution to execute them. While there are very few BPM plus CRM products in the CRM market today, it is the case that with the current interest in customer experience, CRM will involve increasingly complex processes. Consequently, a process-based CRM solution may become a pervasive option among most enterprises, regardless of their size.

About Technology Evaluation Centers

Technology Evaluation Centers (TEC) provides insight and expertise in offering impartial resources and services to minimize the costs, risks, and time associated with software selection. Over 3.5 million technology decision makers visit TEC's Web sites each month, to find information on hundreds of solutions, and to access articles, white papers, and podcasts.

TEC's decision support system (DSS) and analyst data assist with the evaluation, comparison, and selection of enterprise solutions and services. TEC's offerings include in-depth research, detailed product information, and software selection services for any industry or company size.

Technology Evaluation Centers Inc.

740 St. Maurice, 4th Floor
Montreal, Quebec
Canada, H3C 1L5

Phone: +1 514-954-3665

Toll-free: 1-800-496-1303

Fax: +1 514-954-9739

E-mail: asktheexperts@technologyevaluation.com

Web site: www.technologyevaluation.com

TEC, TEC Advisor, and ERGO are trademarks of Technology Evaluation Centers Inc.

All other company and product names may be trademarks of their respective owners.

© Technology Evaluation Centers Inc. All rights reserved.

BPM20130610

