

*Session 1*



# Customer Relationship Management Cloud Computing CRM on cloud

**Madhukumar Manchiraju**

## CRM functional topics

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- ❖ What do i sell? What is my PLC?
- ❖ Who are my customers? why to store customer data ?
- ❖ What is service management? How do i service my customers? how i can increase efficiencies, while reducing costs?
- ❖ How i can help my sales force Automation? How can sales people get more efficient & sell more? Do efficient campaigns, generate more leads, increase leads conversion to sale?
- ❖ How to generate ideas to develop new product features



*CRM Evolution*

# CRM Evolution

## *Service Management & CRM*

# How customer talks to company

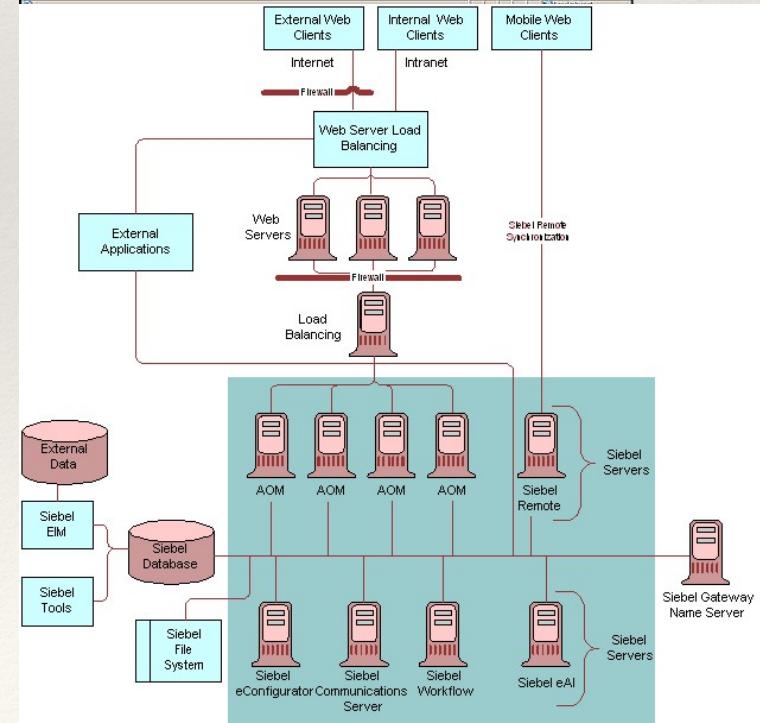
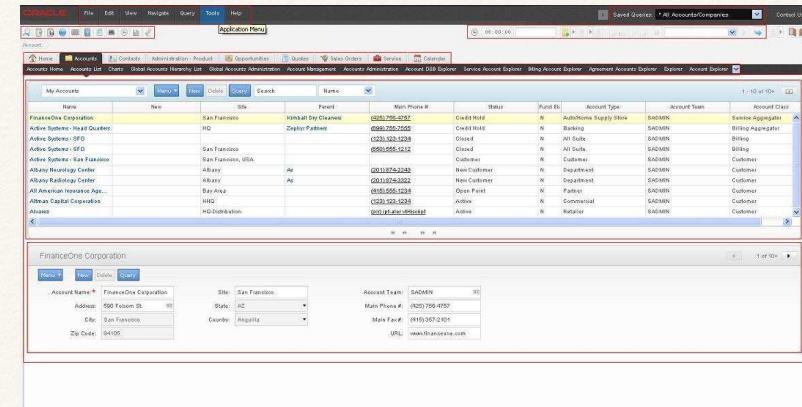
Customer in the past had little touch points with company - early 90's  
Technology has made it possible to have multiple touch points , so what does this mean? CRM Scope?



## CRM UI & Building blocs

## Traditional CRM & Architecture

How traditional CRM applications looked like?  
What is OLTP & OLAP DB?  
How much did it cost to build and deploy a CRM application  
what are different servers that make this system?

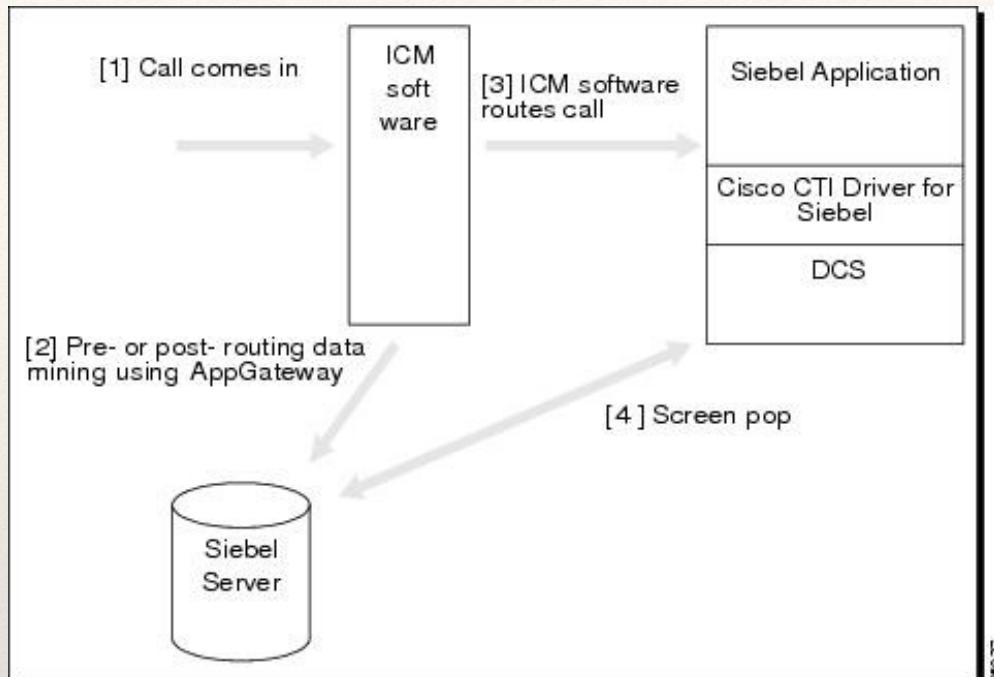


## CRM in Action

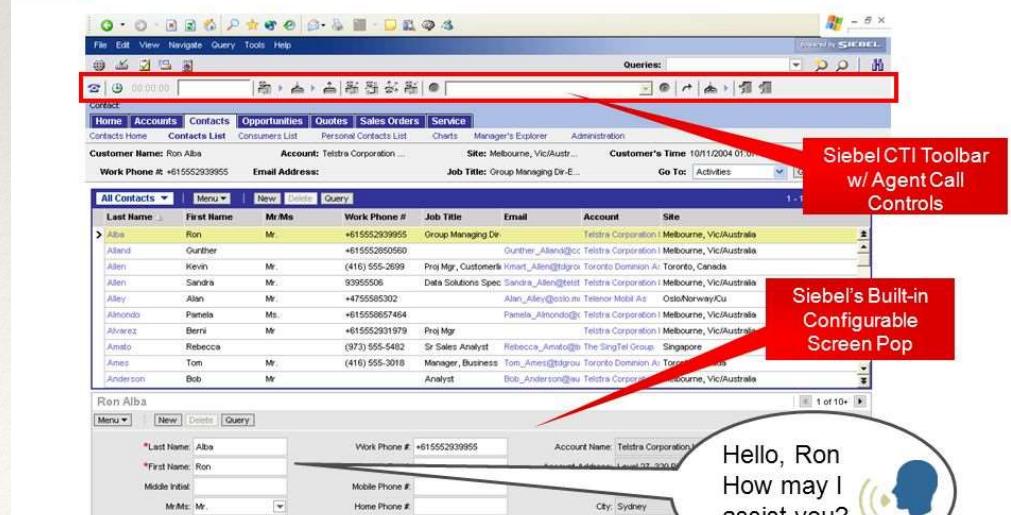
# CRM Case Study - Call Center set up

How call center an important aspect in CRM is set up and run  
Live Example

## Q & A

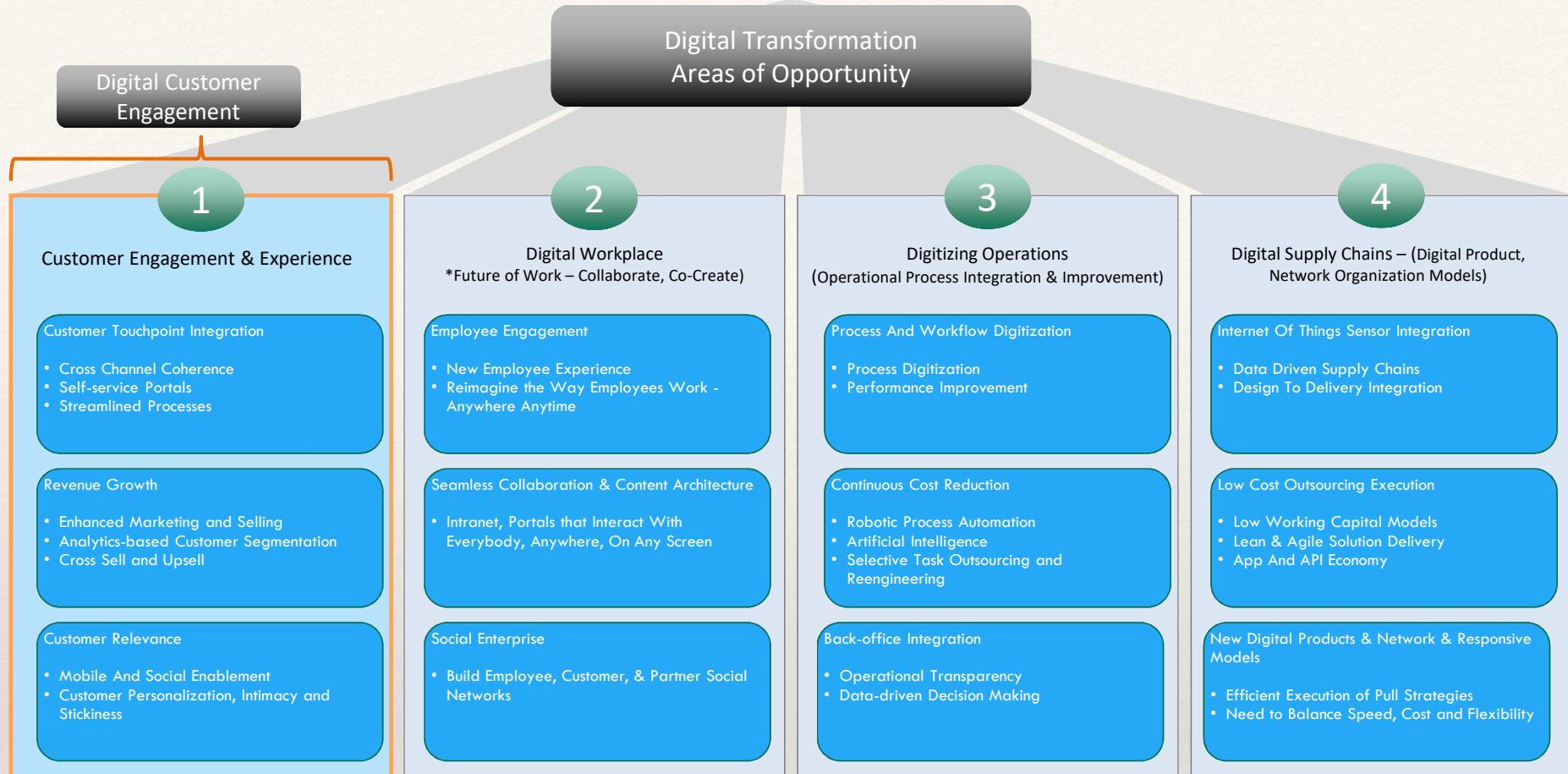


## CCA - Siebel Enterprise

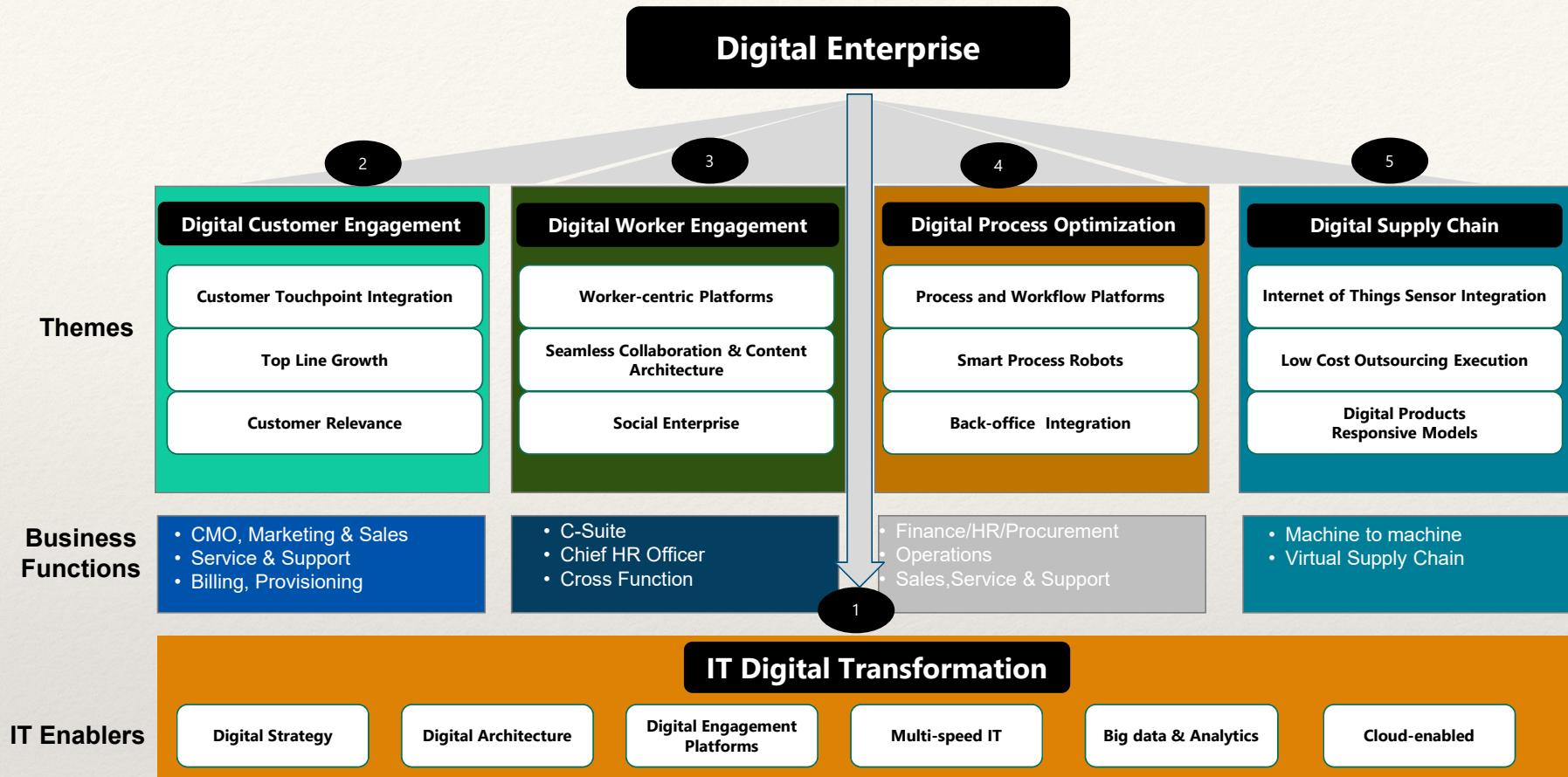


# Digital Technologies & Transformations

# Market View of Digital Transformation - 4 Broad Themes and Priorities



# Enterprise View of Digital Transformation Five Key Components



# Digital Customer Engagement – An Enterprise Perspective

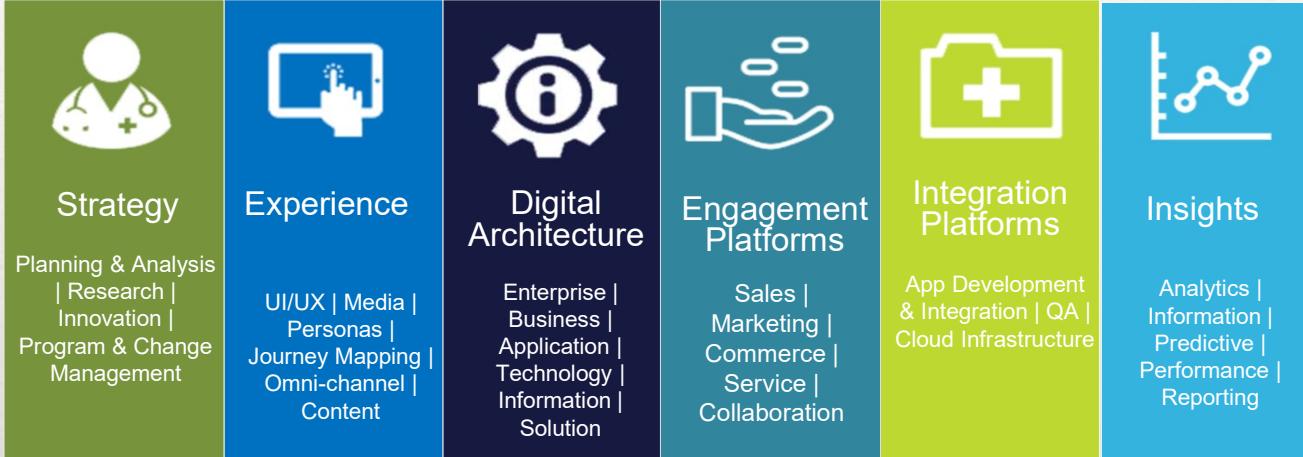
WHY

- New Customer Engagement Models to Accelerate Revenue
- New Digital Business Models
- Reducing Engagement Cost to Increase Customer LTV Profitability
- New Customer Journeys & Experiences
- Digital Transformation Theme

WHAT

- Unified Omni-Channel Experiences
- Marketing Solutions
- Sales Solutions
- Commerce Solutions
- Services Solutions
- 360° Customer Analytics
- Engagement **Solutions**
- Business Capability Driven

HOW

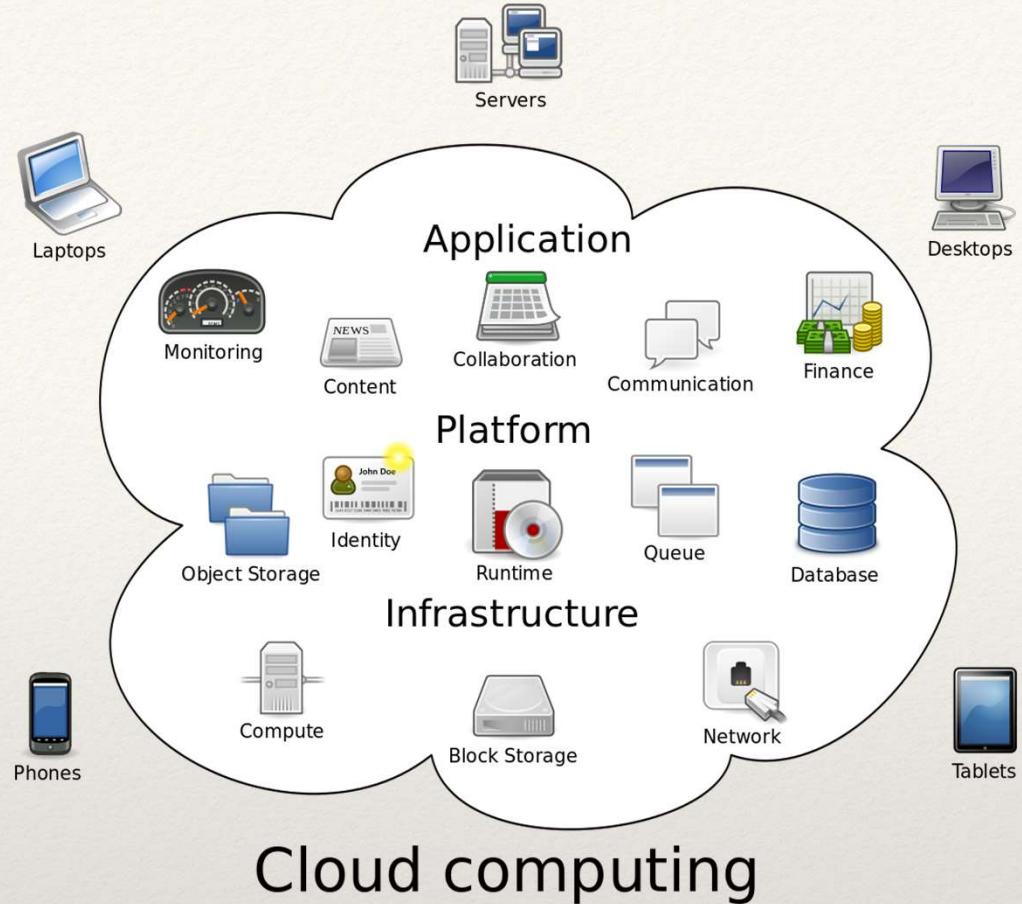


WHO

Multi- Disciplinary Teams | Co-Innovation Partnerships | Global Delivery Models

- Delivery Models

# Cloud Computing



*Cloud Computing*

Cloud Computing introduction

Cloud Adoption

Cloud service models



*Lorem Ipsum Dolor*

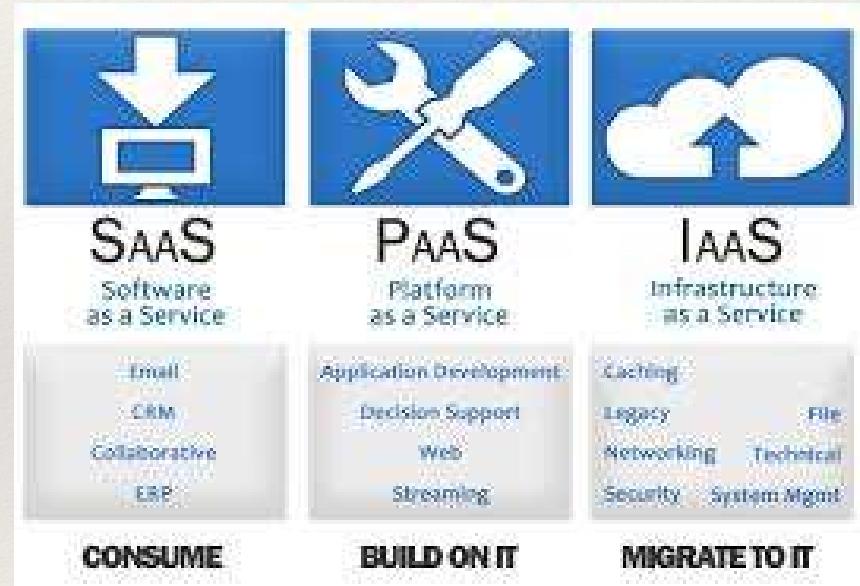
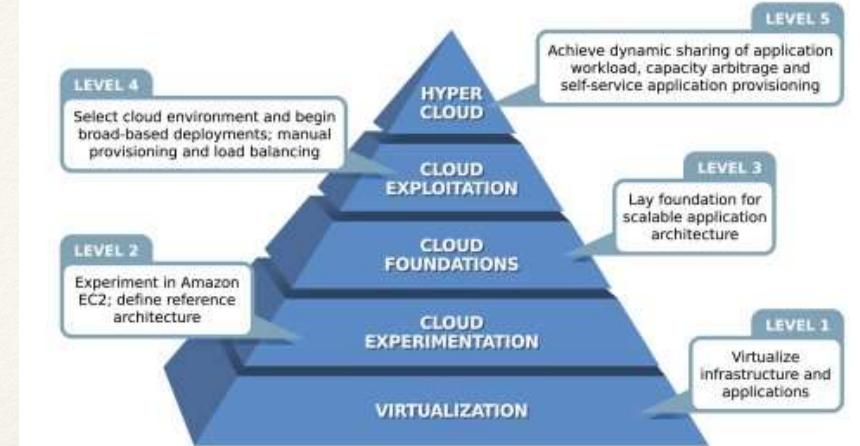
# Cloud Computing

Types of clouds - Private, Hybrid, Public

Cloud Service Models - P,I,A, SAAS

Examples

## THE CLOUD COMPUTING ADOPTION MODEL

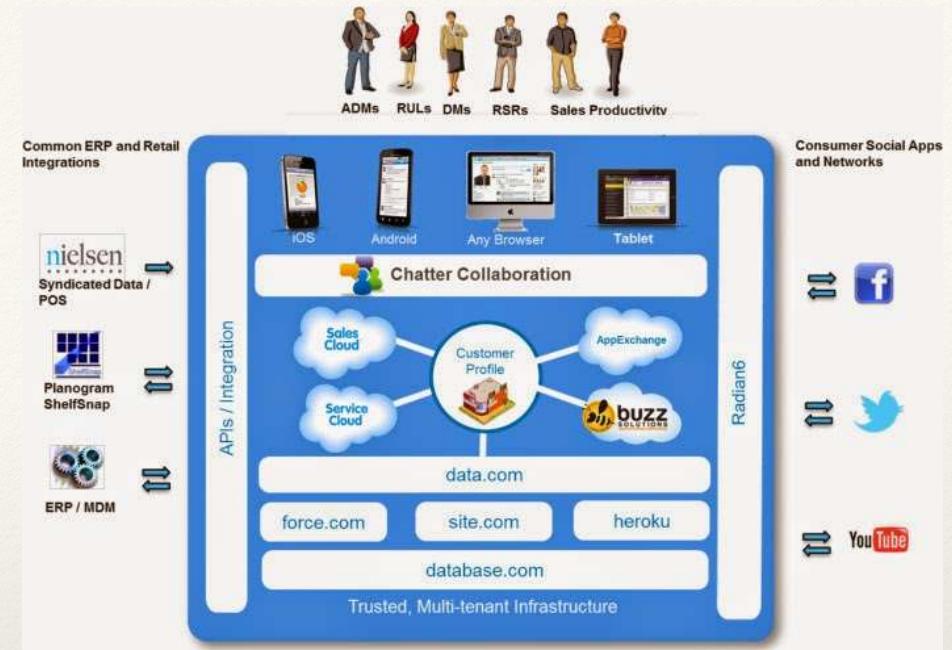


# Cloud services

IAAS

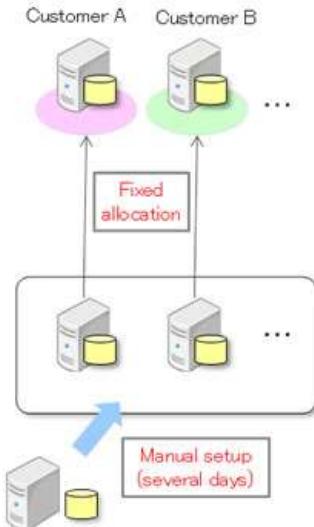
SAAS

PAAS



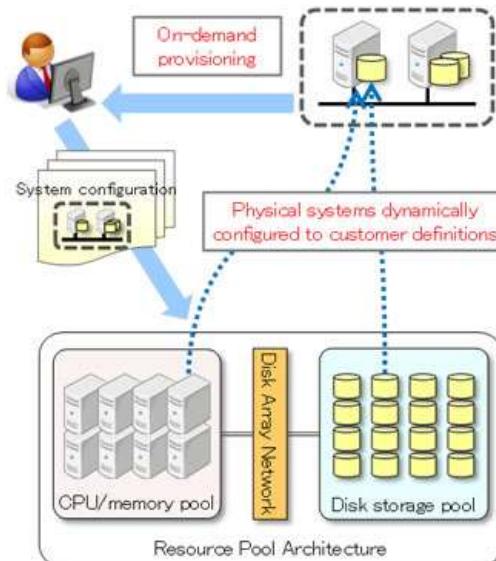
## Conventional physical IaaS

Physical servers provided to customers

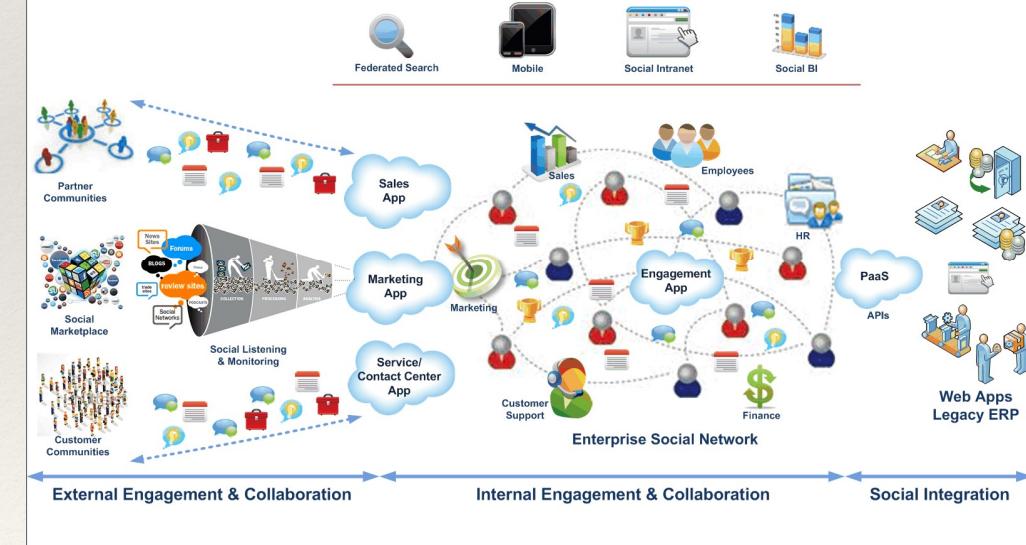


## New physical IaaS

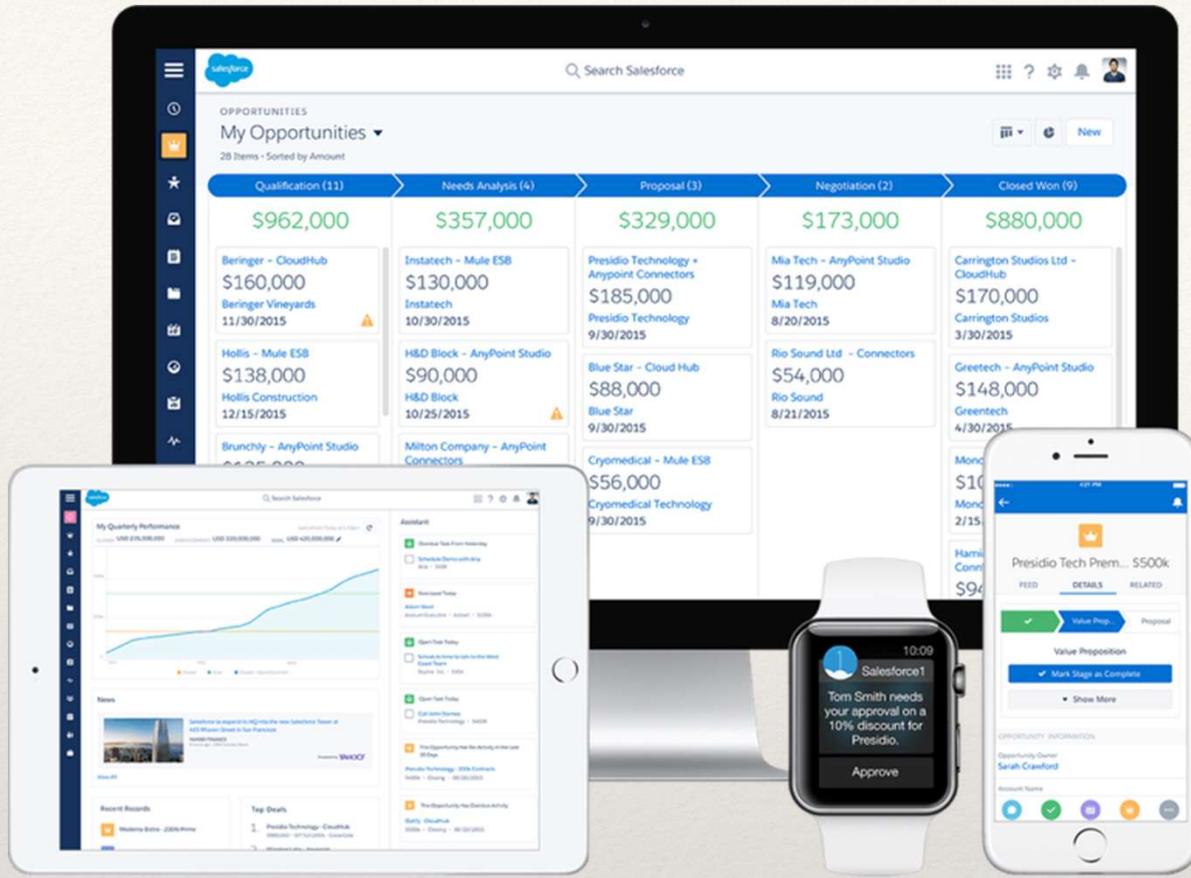
Physical servers dynamically provided to customers



## Social Business Architecture



Created By: Karthik Chakkarapani, 2013



what all do you see in this picture and what can you infer? How is this different from the previously shown Siebel application? What is your know how on UI technologies?

SFDC Case study on the same call center

How we set up omni channel

what are community features

SFDC AI, R, Big data

IOT

IOT example case study

Enable Omni-Channel

[Save](#) [Cancel](#)

## Service Channels

[Back to List: Service Channels](#)

### Basic Information

[Edit](#) [Delete](#)

Service Channel Name	Cases
API Name	Cases
Salesforce Object	Case
Custom Console Footer Component	

## Routing Configurations

[« Back to List: Routing Configurations](#)

### Basic Information

[Edit](#) [Delete](#)

Routing Configuration Name	High-Priority Cases
Developer Name	High_Priority_Cases
Overflow Assignee	<a href="#">Harinath Babu B V Chintalapudi</a>

### ▼ Routing Settings

Routing Priority 1

Routing Model Most Available

Push Time-Out (seconds)

Units of Capacity 4.00

Percentage of Capacity

### ▼ Related Queues

Label	Queue Name	Queue Email
<a href="#">High-Priority Cases</a>	High_Priority_Cases	

**Save** **Cancel**

## Basic Information

Status Name  API Name

## ▼ Status Options

Choose whether agents are online or busy when they use this status. Online statuses let agents receive new work items. Busy statuses

- Online
- Busy

## ▼ Service Channels

Select one or more service channels to assign to your presence status. Work items from those service channels will be routed to agents time—such as leads and cases simultaneously—assign both of those Service Channels to the same Presence Status.

Available Channels	Selected Channels
<div style="height: 150px;"></div>	<div style="height: 150px;"><p>Cases</p></div>

Add  Remove 

Below is the information for the console app. Click Edit to change the console app.

## Custom App Detail

[Edit](#) [Delete](#) [Clone](#)

App Label	Omni-Channel Console
App Name	Omni_Channel_Console
Namespace Prefix	harinath
Logo	
Header Color	#FFFFFF
Primary Tab Color	#0070D2
Footer Color	
Description	
Created By	<a href="#">Harinath Babu B V Chintalapudi</a> , 2/5/2018 11:00 AM
Navigation Tab Items	Cases Home Accounts Contacts
Show Customize My Tabs on the Navigation Tab	<input type="checkbox"/>
List Placement	Full screen, unpinned. Lists are visible only when the navigation tab is selected.
Whitelisted Domains	
Console Components	Omni-Channel
Console Components Alignment	Right
How Lists Refresh	None
How Detail Pages Refresh	None
Choose Push Notifications	<a href="#">Select objects and fields for notifications</a>
Choose Keyboard Shortcuts	<a href="#">Customize keyboard shortcuts</a>
Save User Sessions	<input checked="" type="checkbox"/>
Enable Multi-Monitor Components	<input checked="" type="checkbox"/>
Enable Pinned Tabs	<input checked="" type="checkbox"/>
Enable Responsive Lists	<input checked="" type="checkbox"/>
Enable Tab Hovers	<input type="checkbox"/>
Enable List View Hovers	<input checked="" type="checkbox"/>
Enable Tab Limits	<input type="checkbox"/>



Search Salesforce

Cases

Hari

New Case



## Case Information

Case Owner	Harinath Babu B V Chintalapudi	Status	New
Contact Name	hari hari	Priority	High
Account Name	Hari	Case Origin	Web
Type	--None--		
Case Reason	--None--		

## Additional Information

Product	--None--	Engineering Req Number	
Potential Liability	--None--	SLA Violation	--None--

## Description Information

Subject	Web site down
Description	<div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div>
Internal Comments	<div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div>

Available - Cases (1) Requests

Web site down High   New   00001031 7 s Accept
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## Optional

- Assign using active assignment rules
- Send notification email to contact

The widgets we received are the wrong size.

Click here to expand the Email action.

All Updates All Emails Attached Articles More

Gautam Vasudev Today at 2:23 PM  
We've emailed the customer and are waiting for more information.

John Smith changed Priority from Low to High. August 17, 2015 at 1:54 PM

John Smith changed Status from New to On ... August 17, 2015 at 1:54 PM

John Smith changed Priority from High to Low. August 17, 2015 at 1:52 PM

John Smith changed Status from On Hold to ... August 17, 2015 at 1:52 PM

Gautam Vasudev changed Status from New ... August 7, 2015 at 2:18 PM

Gautam Vasudev OrderSummary.png August 7, 2015 at 2:17 PM

Selected ▾ us Next ►►

Experts Michael Ramsey

Files OrderSummary.png

Search Knowledge...

Articles

Changing widget sizes  
To change widget sizes, you must first contact the widget department. The widget department controls everything in the...

FAQ • Assigned to Gautam Vasudev • None Last Modified 6/10/2016

Macros Knowledge History



English ▾ | My Account | Logout



WELCOME, STEPHANIE

[Edit Profile](#)



Find an Assignment



Apply for a New Role

DASHBOARD

ASSIGNMENTS

RULES

TRAINING

HELP AND RESOURCES

### Upcoming Activity

2014

August  
15 - 20

In School Event - Italy



Workshop Leader MVP  
**Under Approval**

Rome, Italy | IBAEM Europe



Confirmed

November  
5 - 8

Creating Inclusive Classrooms: 29838



Workshop Leader Contrium  
**Invited**

Istanbul, Turkey | IBAEM Europe



Confirmed

December  
12 - 17

In School Event - Greece



Workshop Leader MVP  
**Confirmed**

Athens, Greece | IBAEM Europe



Applicant

### My Roles

#### Initial

Reader Professional Development

Confirmed

School Visit Team Member Professional Development

Confirmed

Workshop Leader Professional Development

Applicant

#### Advanced

Consultant Professional Development

[Apply](#)

Program Field Representative School Service

[Apply](#)

Artificial Intelligence (AI) is the concept of having machines “think like humans” — in other words, perform tasks like reasoning, planning, learning, and understanding language. The brains behind artificial intelligence is a technology called machine learning, which is designed to make our jobs easier and more productive.

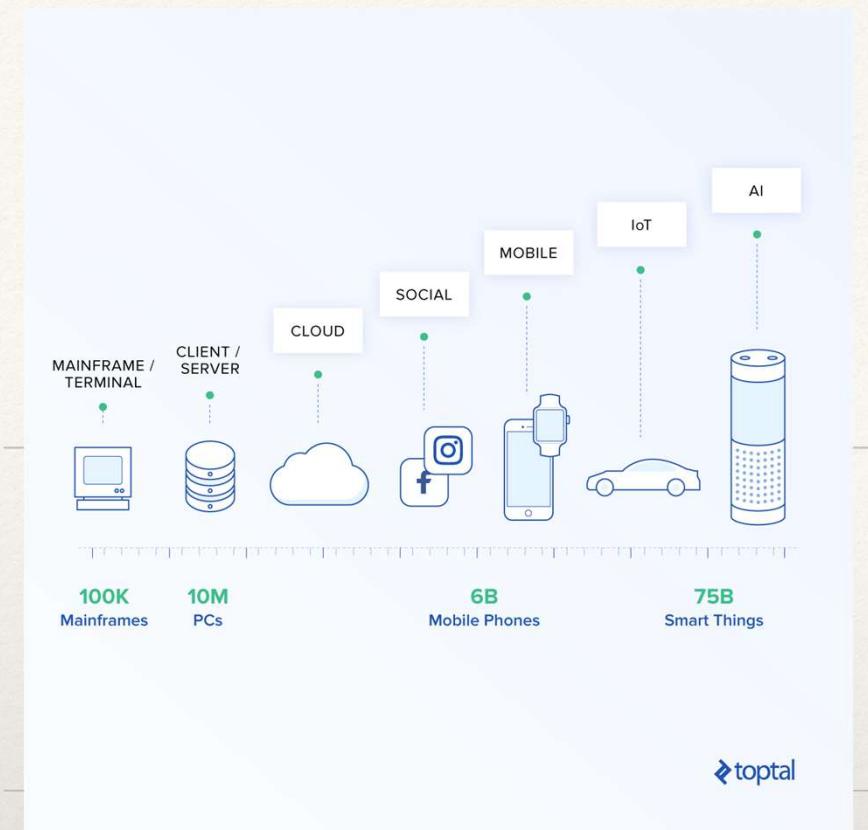
Machine Learning is the core driver of AI, and involves computers learning from data with minimal programming. Essentially, instead of programming rules for a machine, you program the desired outcome and train the machine to achieve the outcome on its own by feeding it data — for example, personalised recommendations on Amazon and Netflix. (Learn more here.) Machine learning is a broad term that encompasses related AI techniques, including: Deep Learning which uses complex algorithms that mimic the brain’s neural network to learn a domain with little or no human supervision. Consumer apps like Google Photos use deep learning to power face recognition in photos.

Natural Language Processing (NLP) uses machine learning techniques to find patterns within large data sets in order to recognise natural language. One application of NLP is sentiment analysis, where algorithms might look for patterns in social media posts to understand how customers feel about a specific brand or product.

Big Data is the raw fuel of AI — large amounts of structured or unstructured information that provide the inputs for surfacing patterns and making predictions.

Internet of Things (IoT) is a network of billions of digitally connected devices, from toasters to cars to houses and jet engines, that collect and exchange data and can communicate with one another to better serve users.

Predictive Analytics is a branch of advanced analytics that is used to make predictions about unknown future events, based on patterns in historical data. You might see this in marketing offers that become more relevant to you each time you take action (or don't) on an email offer



CHAPTER 1 2 3 4 5 6

## Smarter Sales

Imagine you're a sales rep named James. Every morning when you wake up, the first thing on your mind is all of your upcoming sales calls. However, you don't have to think too hard because you wake up in a connected world. You check your smartphone and your CRM automatically displays an itinerary of your day. All of your key customer meetings are organized in priority of opportunity value. Your smartphone also displays each customer's three primary pain points, along with directions to reach the customer's site on time, already pre-programmed into your car's GPS. A quick cup of coffee, and you're ready to start your day.

AI for CRM: Everything You Need to Know

