Literature Study

Customer Relations Managament (CRM) & Software as a Service (SaaS)

This document details the literature study conducted in order to discover and define concepts and features that make up the functionalities of a CRM system, as well as the discovery of what SaaS means and how its terminologies are applied within CRM systems, as well as discovering what OOS is, alongside the unique features that define an OOS.

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I.   CRM — What is it?

Customer Relations Management (otherwise known as CRM), is a software tool that helps users focus upon their organization's relationships with individual people (customers, service users, colleagues, etc.)

Types of CRM
According to Salesforce, CRM can be defined within three core areas:

1. CRM as Technology

   Technology product, often in the cloud, that teams use to record, report and analyse interactions between the company and users.

2. CRM as a Strategy

   This is a business' philosophy about how relationships with customers and potential customers should be managed.

3. CRM as a Process

   Think of this as a system a business adopts to nurture and manage those relationships.

CRM as a Model
Its terminologies, when applied as a business model, focuses upon enhancing business efficiency and brand awareness, whilst lowering costs. This is achieved through customer-driven work methods, in order to achieve customer superformance, proactive co-creation, and an iterative product cycle:

1. **Customer Superformance** — Exceeding customer expectations via reduced service failures and recovery awards for customers.

2. **Proactive co-creation** — developing your solutions directly with your customers, without much friction or need of persuasion.

3. **Iterative product enhancement/improvement cycle** — eases product enhancement sessions due to familiarity with customer needs and wants; comes from active sessions and involvement.

Must Have CRM Features

According to ScienceSoft, the must-have features within a SaaS CRM system include:

1. *Prospecting*
   Multi-channel communication with prospects, including social medias.

2. *Lead management*
   Managing leads/customers/users assisted by AI.

3. *Sales activities*
   Activity feed, emails, calendars, notes and reminders (tools to assist in activity).

4. *Team collaboration*
   Transparent logs, chats, conversation threads, co-workers.

5. *Customer retention*
   Help desk, chatbots, service level management for handling customer tickets, surveys, self-service portals.

6. *Analytics and reporting*
   Dashboards + reports (customizable), analytics (predictable and past), employee performance reports.

7. *Security and compliance*
   Encryption, user-based access control, compliancy with local regulations.

Alongside the features, the competitors start and look at their CRM system:

1. Microsoft Dynamics 365
2. Salesforce
3. SAP
4. Oracle
5. Adobe Experience Cloud
6. Monday CRM

II. SaaS CRM

Software as a Service (SaaS) is a form of cloud computing, where everything that a user needs is hosted within the cloud and are made available to access by the users via the internet.

In the Cloud

SaaS has become more and more popular for the digitalization of the business industry, which allows all tools to be hosted in the cloud. And when businesses utilize these cloud-based software, they can no longer worry about hardware enhancements, as most SaaS solutions aspire to work on all hardware. Reliability issues are also reduced as maintenance are handled by SaaS providers.

Security and Connectivity

With SaaS being hosted data within the cloud, there's one secure, unique entry point for all (Bourhois, J. 2017), which does not compromise data security. SaaS also allows multiple connectivity with different products and services, using what is called APIs that bridges connection between SaaS software and applications.

How is SaaS related to CRM?

SaaS within CRM enables permanent access to CRM functionalities and support, without the need to install any applications, and/or conduct manual maintenance; it is embodied as a microservice that can be utilized only when is needed by the user.

Offering CRM as a SaaS

The capabilities of hosting a CRM software to the cloud is via its microservices features that could serve multiple customers, essentially creating a multi-tenant architecture within its cloud infrastructure. With this power of serving multiple customers, scalability and customizability comes next as a priority to ensure that all is secured and usable as the needs expand.

Due to its cloud hosted availability, most solutions must be a web-based interface with flexible scalability and/or expansion possibilities. That way, a CRM platform can be fully utilized and easily maintained altogether.

The Future of SaaS for Businesses

Taking early advantage of SaaS systems allows business to spend less time and money on server maintenance, giving smaller businesses the chance to utilize smart digital solutions, without causing too much money off their wallet.

III. OOS & POS — What is it?

Online Ordering System (OOS) is a solution that, when combined with Point of Sales (POS) systems, encapsulates multiple feature-based solutions tailor-made for restaurateurs to use within their daily in-store operations.

There are many different applications of OOS, but it mainly focuses upon displaying and receiving orders from customers, and relaying them to the staff members fo the restaurant.

With online ordering software (e.g. ordering application), you can put in place a system that will allow your restaurant or cafe to take orders and accept payments from a distance:

- Simply access a menu through mobile ordering.
- This can either be done by scanning a QR code,
- or entering a link into the search bar.

Once your customer makes their selection, they submit their order and pay all in one go. Once the order is received on the restaurant's end, all that's left is for the order to be taken to the customer's table or packaged ready for delivery.

This drastically speeds up the whole online ordering process. Everything takes place through a smartphone, instead of a constant back and forth with staff.

Online Ordering System Advantages

1. **Safer and healthier**

   Digitalizing menus and order taking, implying safer processes for COVID-19 regulations

2. **Less room for error**

   Ensures accurate prices and user feedback (dependant on system interface)

3. **More customers**

   2-in-1 solution for accessible platform and customer acquisition (in and out-store ordering)

4. **Increased customer loyalty via personalized solutions**

   According to a recent study (A. Nidhi, 2021), a personalised digital experience is also a good way to encourage customers to keep coming back. Out of 1000 customers surveyed, 50% said they would switch brands that give them a poor online experience, whilst 71% expected online personalisation.

   Personalization drives performance and better customer outcomes. Companies that grow faster drive 40 percent more of their revenue from personalization than their slower-growing counterparts.

5. **Higher customer spend**

   Order values increase when customers order online. That's because studying an online menu is different to standing in a queue.

6. **Highly customisable**

   Room for perosnalized brand, logos, and so much more! Increases marketing quality as well as brand recognition.

7. **Reduced costs**

   An ordering system for small businesses is a lot cheaper because it's all digital, and in many cases the only cost is a small processing fee on transactions.

Point of Sales Ecosystem

The POS ecosystem contains multiple solutions that are utilized for daily in-store operations. One can be used at many different scenarios, within stores and restaurants, and are usually tailor-made for each specific needs.

Within a restaurant/foodservice setting, the ecosystem consists of multiple core solutions:

I.   For consumers/customers:
   a.   Online Ordering System
   b.   Digital Payments
   c.   Customer Benefits

II.   For restaurateurs/employees/staff:
   a.   Table & Booking Management
   b.   Order Management
   c.   Kitchen Management

With the presence of POS systems in various different personalization methods, numerous restaurateurs ranging from subordinate to managerial levels can utilize the system, through proper identification of roles and associates within the premises. Data that is gathered are shared equally, however the means by which it is represented may differ per user roles.
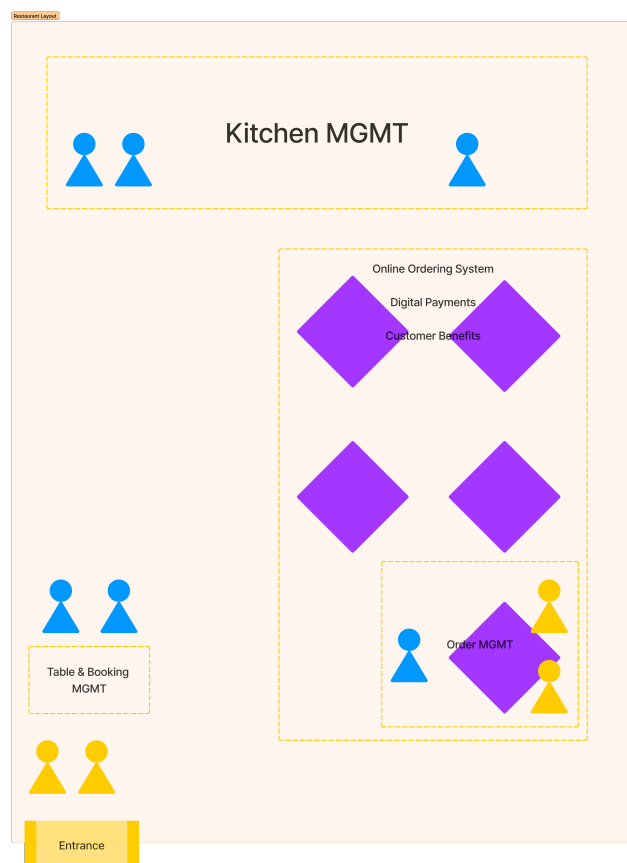
Hence, POS consists of a wide variety of solutions bundled together, and requires extreme tailoring and fitting to ensure optimal usage per restaurateur. That is not to say,

that a modular POS solution cannot be made out of this discovery: if anything, the opportunity lies upon creating a system that is seamless and easy to understand between user roles. It requires extensive categorization and sheer amounts of sub-features to be listed per solution, so that clutterness and discombobulation is absent, ensuring relevant and up-to-date data that is represented visually and simply for better efficiency.

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Appendix

1 — CRM & SaaS

What factors define the functionality of a CRM platform?

What factors define a scalable and reliable SaaS model, and how is it related to CRM systems?

What contributions do PWAs offer in enhancing the user experience of CRM platforms?

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SaaS CRM — Cloud-based software, giving permanent access to the CRM functionality and support without need to install and maintain (for vendors).

Brings transparency in customer relationships and helps businesseses grow via automation, personalization of marketing, sales and customer services.

Good pros:

+ Ample functionality and avoiding big investments
+ Modern CRMs have flexible systems, meaning you have capabilities with the default setting and can tailor workflows for your specificity
+ Data kept in cloud, hence accessible anytime, anywhere
+ SaaS providers have APIs and connectors ready to integrate with systems for acquiring more data

CRM helps users focus on their organisation's relationships with individual people including customers, service users, colleagues, or suppliers.

According to Salesforce, CRM can be defined within three areas:

1. CRM as Technology
   Technology product, often in the cloud, that teams use to record, report and analyse interactions between the company and users. This is also called a CRM system or solution.

2. CRM as a Strategy

   This is a business' philosophy about how relationships with customers and potential customers should be managed.

3. CRM as a Process

   Think of this as a system a business adopts to nurture and manage those relationships.

In Obero's case, the potential solution would be a CRM as a Technology Process, one that incorporates adopted CRM systems that are implemented within a working product.

Its usage? For vendors to manage restaurateurs, and for restaurateurs to self-manage their restaurants.

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CRM as a Model (Strategy in Salesforce's categorization)

CRM as a model means enhancing business efficiency, increasing brand awareness and lowering costs via customer-driven work methods, in order to achieve:

1. Customer Superformance — Exceeding customer expectations via reduced service failures and recovery awards for customers.

2. Proactive co-creation — developing your solutions directly with your customers, without much friction or need of persuasion.

3. Iterative product enhancement/improvement cycle — eases product enhancement sessions due to familiarity with customer needs and wants; comes from active sessions and involvement.

According to ScienceSoft, the must-have features within a SaaS CRM system include:

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   Transparent logs, chats, conversation threads, co-workers.

5. *Customer retention*

   Help desk, chatbots, service level management for handling customer tickets, surveys, self-service portals.

6. *Analytics and reporting*

   Dashboards + reports (customizable), analytics (predictable and past), employee performance reports.

7. *Security and compliance*

   Encryption, user-based access control, compliancy with local regulations.

Competitors to start and look at their CRM system:

1. Microsoft Dynamics 365
2. Salesforce
3. SAP
4. Oracle
5. Adobe Experience Cloud
6. Monday CRM

Compare and contrast analyze with Obero's CRM system.

Ultimately, CRM is managing your relationship with your customers. You need a comprehensive system that is customizable for vendors to use to reach out their restaurateurs.

- *Ordering system is an additional feature within CRM that Obero uses for a specific use case of managing restaurateurs.*

- *Ultimately, all associates will be referred to as 'customers' as the person who is being contacted, managed and/or reached by the vendors (aka managers).*

Salesforce's CRM In a Nutshell:

Here's what you should take away from this article:

- What's the definition of CRM? CRM refers to how a business manages its relationships with customers and potential customers.

- What's the most popular form of CRM? The most popular form of CRM uses technology to enable businesses to track and analyse customer interactions.

- Why is CRM important? CRM enables businesses to create more meaningful and profitable relationships with customers, service users, colleagues, partners and suppliers.

- What does a CRM system provide? A CRM system offers a clear overview of customer activity, and then presents that information in the form of a customisable dashboard.

- What are the benefits of CRM? CRM improves sales forecasting and productivity, increases customer loyalty, enables accurate sales reporting, maximises marketing ROI and improves service.

- Can CRM go beyond sales and marketing? While CRM is traditionally seen as a sales tool, it can deliver powerful benefits across the organisation -- from HR and customer service to supply-chain management.

What is CRM in simple terms?

CRM stands for Customer Relationship Management, and it can refer to a technology, a process or a strategy. Focusing on CRM technology helps businesses build and manage relationships with customers, suppliers, partners and colleagues, primarily by leveraging analytical insights.

What does a CRM system do?

A CRM system provides a central place for businesses to store customer and prospect data, track customer interactions, and share important information between colleagues. It gives businesses a 360-degree view of their customer, enabling them to build better relationships by engaging in more personal and relevant ways.

What are examples of CRM?

- **CRM as Technology:** This is a product that analyses interactions between a company and its users.
- **CRM as a Strategy:** This is a business's philosophy about how relationships with customers and potential customers should be managed.
- **CRM as a Process:** This is the system a business adopts to nurture and manage those relationships.

- **Why is cloud-based CRM ideal?** Cloud-based CRM offers instant deployment, cost-effective scalability, and access from anywhere on any device.

Personal CRM

A much smaller use case: Personal CRMs for freelancers, users with closer, more personal usage with keeping in touch with their 'customers'.

- Ease of customer inputs
- Straightforward, one case usage of reminders to keep in touch with the customer.
- Presence of Timeline, feature known to be available throughout CRM systems.
- Check, see and know your customers (info, personal inputs, addresses)
- Some categorization of 'customers' from activity/engagement point of view, to probability point of view

6 Best CRM in 2022 (for UK Businesses):

1. Salesforce Service Cloud
2. Zendesk for Service
3. Freshdesk
4. Hubspot Service Hub
5. Zoho
6. Dynamics 365 for Customer Service

Obero's Service CRM

a. Focusing on Service/Support CRM, not Sales CRM.

b. Hence, lead management is diminished (not relevant).

c. IAM is used here for selecting organization

d. Deliverables for school, the same as company:

    a. Report/portfolio articles

Basically, a customer-centered internal support and service management, that manages existing customers within your businesses.

12 Features to Look for in a CRM Solution/Software

1. Workflow automation
   1. For sales-centered CRM

2. Messages, task related

2. Customization
    1. For all CRM solutions
    2. Tailoring for the user to use easily

3. Third party integration
    1. Makes it easy and faster for users to integrate with other solutions available

4. Customer service
    - Gives you a 360-degree comprehensive view of customers that shows everything there is to know about a customer from the first point of contact
    - Automatically tracks all points of communications, from lead acquisition to closed sales and sales histories
    - Logs all incidents, website visits, purchase histories, and other activities for future reference and to keep all reps on the same page
    - Uses customers' first names to personalize all correspondence
    - Has unique reference numbers for each account, customer and help issue
    - Automatically sends customers acknowledgments of their inquiries and messages so they don't feel ignored
    - Supports premade email templates and call scripts that answer the most common questions

5. Employee tracking
    1. Self tracking hours, work time, pays etc.
    2. Suitable for management

6. Social media
    1. Suitable for marketing and sales
    2. Templates for quick efficient marketing strategies

7. Lead management
    1. Identify potential customers and future opportunities

8. Real-time data

1. very important to ensure up to date metrics and information for users

9. CRM analytics
    1. Customer analytics
    2. Informs user of customer data and insights
    3. helps in conducting reasonable decision making

10. Reporting
    1. Basically a summary or overview
    2. Important as analytics
    3. Gives insight into trends, data related factors, etc
    4. Gives good judgment of how effective/efficient your strategies are executed

11. Sales forecasting
    1. Not so relevant only for sales CRM

12. Emails
    1. It's important for every single sales email to be received and addressed in a timely fashion to increase the probability of generating revenue.

For Restaurateurs: Online Ordering System

Implementing an online ordering system - sometimes called virtual ordering or contactless table ordering - is one of the best ways to turn a website into a customer acquisition channel.

An online ordering solution can be used to take orders, but it can also be used to order food in-person to make the ordering process more efficient. If your in-store point of sale/ POS system is slow and inefficient, an online ordering platform is a great alternative.

What?
With online ordering software you can put in place a system that will allow your restaurant or cafe to take orders and accept payments from a distance - both online and in-person:

- Simply access a menu through mobile ordering.
- This can either be done by scanning a QR code,
- or entering a link into the search bar.

Once your customer makes their selection, they submit their order and pay all in one go. Once the order is received on the restaurant's end, all that's left is for the order to be taken to the customer's table or packaged ready for delivery.

How do online ordering systems work?

Online ordering systems operate similarly to an online takeaway. Your customer orders online, completes their payment and can then get their food delivered or pick it up at your store. The ordering process is easy:

1. **Your customer browses your online menu on their laptop or mobile phone.** They can do this in front of your store (also called click and collect) or at home.
2. They pick what they want to order, and add any delivery or meal instructions.
3. They pay directly through the system by filling in their card details. You can also choose to send them a payment link if you are taking the order over the phone.
4. The payment is processed securely and no payment details are stored on any device.
5. Your customer's order is delivered to their house or they can pick it up at a specific time.

This drastically speeds up the whole online ordering process. Everything takes place through a smartphone, instead of constant back and forth with staff.

Online Ordering System Advantages

1. **Safer and healthier**
   Digitalizing menus and order taking, implying safer processes for COVID-19 regulations

2. **Less room for error**
   Ensures accurate prices and user feedback (dependant on system interface)

3. **More customers**
   2-in-1 solution for accessible platform and customer acquisition (in and out-store ordering)

4. **Increased customer loyalty via personalized solutions**
   According to a recent study (A. Nidhi, 2021), a personalised digital experience is also a good way to encourage customers to keep coming back. Out of 1000 customers surveyed, 50% said they would switch brands that give them a poor online experience, whilst 71% expected online personalisation.

   Personalization drives performance and better customer outcomes. Companies that grow faster drive 40 percent more of their revenue from personalization than their slower-growing counterparts.

5. **Higher customer spend**
   Order values increase when customers order online. That's because studying an online menu is different to standing in a queue.

6. **Highly customisable**
   Room for perosnalized brand, logos, and so much more! Increases marketing quality as well

7. **Reduced costs**

   An ordering system for small businesses is a lot cheaper because it's all digital, and in many cases the only cost is a small processing fee on transactions.

Excerpt taken from Research Paper: Perceptions_of_restaurateurs_on_quality_grading

DISCUSSION

None of the mean scores falls below the mid- mean value of 2.5. It can therefore be deduced that restaurateurs feel positive towards a grading system for full-service restaurants. It should also be noted that restaurateurs awarded a high mean score (M=3.12) to the statement that grading should be based upon customer expectations or opinions. This indicates that the restaurateurs fully realise the importance of customer participation in grading of independent full- service restaurants. Based on the proportion of respondents who selected the 'totally agree' and 'agree' response option, 82.3 percent (n=218) agree that grading exposes restaurants to international tourists, with 40.8

percent (n=108) agreeing totally with the statement regarding restaurant grading. The statement to which the smallest proportion (60%, n=159) of respondents agree, is that a graded restaurant can expect an increase in profit.