

# Customer Modeling: Moving towards a Best Practice Model

by:  
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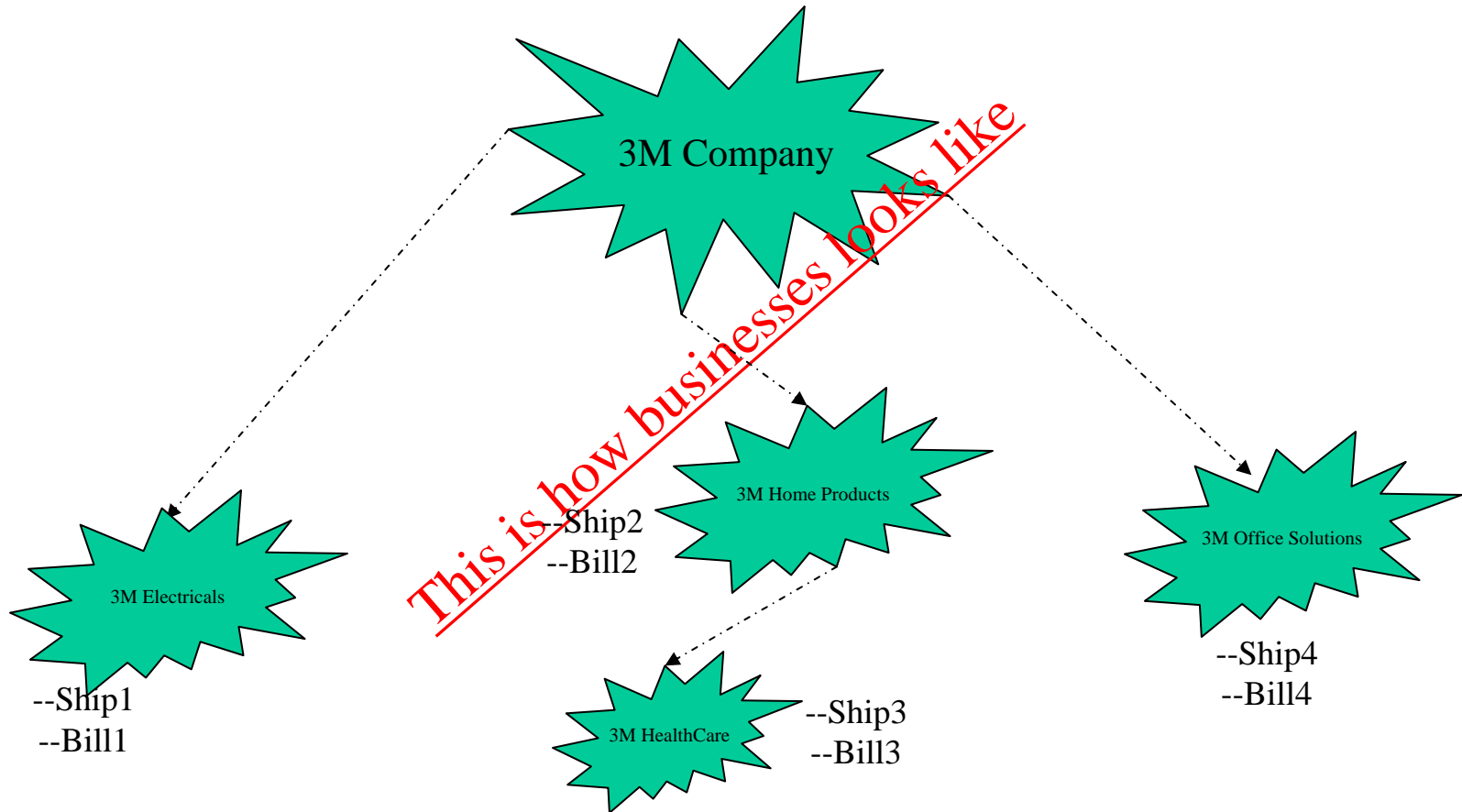
## Speaker Qualifications..

- Naveen is a Consultant in Enterprise Solutions Unit of Infosys
- Naveen has been involved in multiple implementations in ERP and CRM space including Sales and Marketing, Service,iStore,Order Management etc
- Infosys Technologies Limited (NASDAQ: INFY) is a global leader in Consulting and IT services ([www.infosys.com](http://www.infosys.com))
- Enterprise Solutions (ES) group at Infosys provides Consulting and End-to-End implementation solutions for almost all the ERP packages (<http://www.infosys.com/services/packaged-applications/default.asp>)
- Oracle Applications practice in ES provides Oracle consulting services to world's leading corporations across various industry verticals
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## Agenda..

- One party, Multiple Sites..Multiple Accounts Model isn't the Best
- Journey towards a Best Practice Model
  - Key implementation considerations
- Post Implementation look-outs
  - How not to go back to the old model

One party...Multiple Sites..Multiple Accounts..Uhh!!



One party/account...Multiple Sites..Uhh!!

The screenshot shows the Oracle Customers - Standard form. The Customer Type is set to 'Organization' and is active. The Organization Number is 1620208 and the Customer Number is 150152992. The Name is '3M COMPANY'. Below the main form, there is a list of sites with the following entries:

Site Name	Address
<input type="checkbox"/>	3M HOME PRODUCTS-BILL2/SHIP2, HOUSTON, HARRIS, TX, 77043, United States
<input type="checkbox"/>	3M ELECTRICALS-BILL1/SHIP1, HOUSTON, HARRIS, TX, 77043, United States
<input type="checkbox"/>	3M HEALTHCARE-SHIP3/BILL3, HOUSTON, HARRIS, TX, 77043, United States
<input checked="" type="checkbox"/>	3M OFFICE SOLUTIONS-BILL4/SHIP4, HOUSTON, HARRIS, TX, 77043, United States
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

Buttons at the bottom include Duplicate Check, Party Relationships, New, and Open. A red diagonal watermark reads 'This is how it looks in Oracle'.

One Party-Multiple Sites

This is how it looks in Oracle

# One party...Multiple Accounts..!!(contd.)

Customers - Standard

Customer Type: **Organization**  Active  
Organization Number: **1620208**  
Name: **3M COMPANY**  
Customer Number: **150152993**  
Alternate Name:   
Tax Registration Num:   
Account Name:   
Taxpayer ID:

Addresses Classification Order Management Marketing Communication Contacts Contacts : Roles

Address  Show Only Active Addresses

**3M HOME PRODUCTS-BILL2/SHIP2, HOUSTON, HARRIS, TX, 77043, United States**

Duplicate Check Party Relationships New Open

Customers - Standard

Customer Type: **Organization**  Active  
Organization Number: **1620208**  
Name: **3M COMPANY**  
Customer Number: **150152994**  
Alternate Name:   
Tax Registration Num:   
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Addresses Classification Order Management Marketing Communication Contacts Contacts : Roles

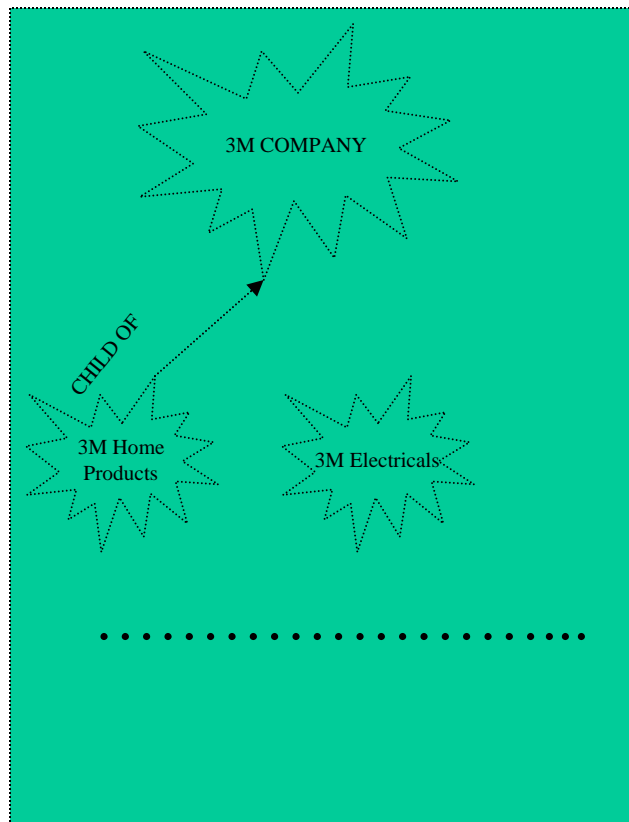
Address  Show Only Active Addresses

**3M Electricals, FAIRBANKS, HARRIS, TX, 77043, United States**

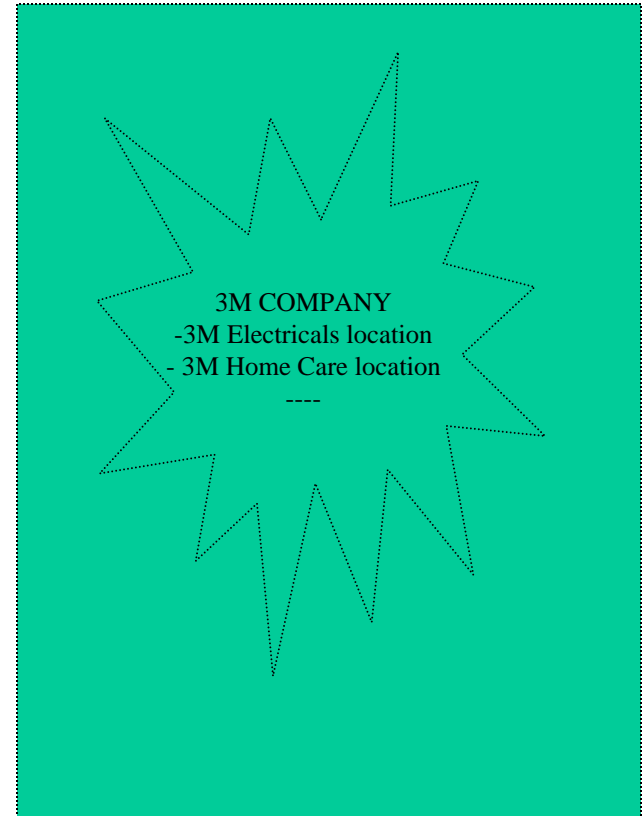
Duplicate Check Party Relationships New Open

*This is how it looks in Oracle*

# One Party Multiple Sites. Multiple Accounts. Why is this not the Best



Business View



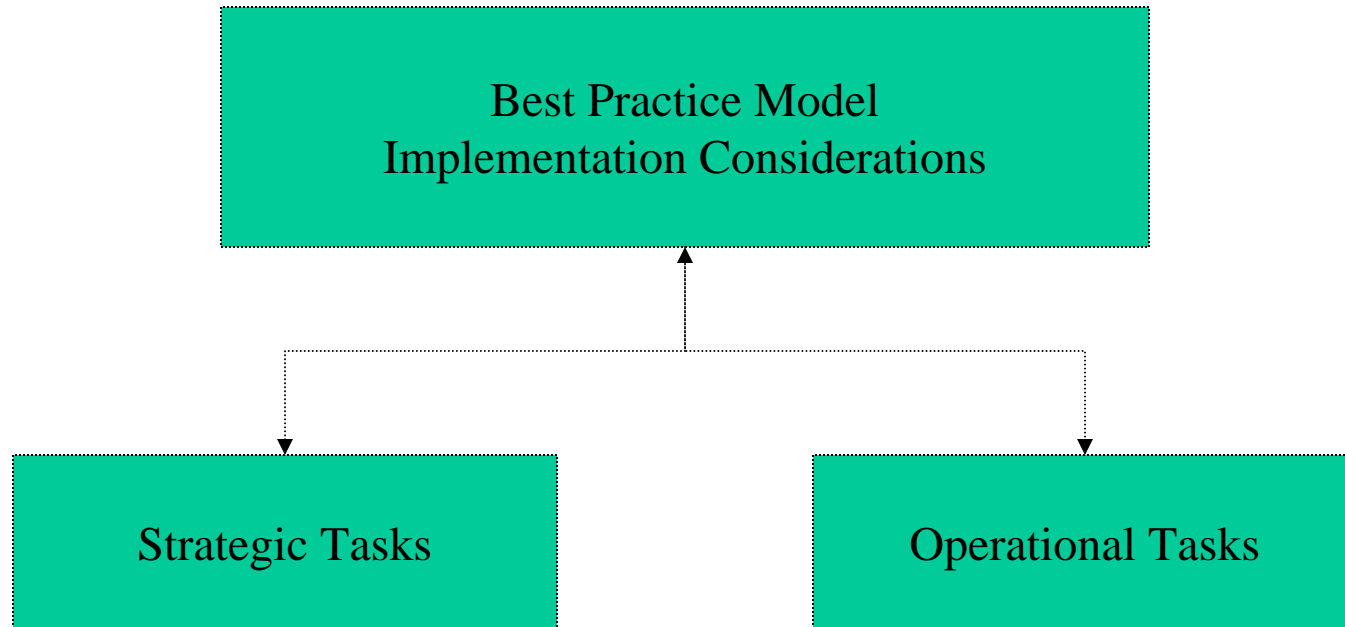
Oracle's View

## One Party Multiple Sites. Multiple Accounts. Why is this not the Best

- **Relationship amongst different businesses modelled as sites is not possible**
  - Information loss (hierarchical relationships information helps business)
- **Multiple businesses modelled as multiple accounts of same party (Account centric)**
  - CRM applications work at party layer and not account layer
- **Loss of Sales Info**
  - Leads and opportunities are created on 3M Company and not the actual business
- **Industry Classifications**
  - Only 1 party can be classified. Different businesses operating in diff industries do not get classified correctly
  - Marketing campaigns which require generation of target lists on basis of industry classifications for email marketing cannot be handled efficiently
- **Credit Mismanagement**
  - Credit management functionality cannot be deployed in an account centric model



# Moving to a Best Practice Model.. Key Implementation Considerations..!



# Moving to a Best Practice Model.. Key Implementation Considerations..!(Strategic)

- **What is Best Practice Model**
  - No generic Oracle Best practice Model
  - Business and not Systems need to decide on BP model
  - Which of existing sites need to be modelled as new parties depending on their business needs
- **Business Need realization**
  - Businesses needs to realize the need to move to best practice model.
  - Business driven activity and not IT driven task
- **Key Stakeholders Identification**
  - Identification of key stakeholders from various departments/divisions(multi-divisional implementation)
- **Communicate.. Communicate.. Communicate**
  - If not communicated properly, one and every issue will be attributed to BP implementation
- **Staged Rollouts**
  - Cannot convert all the customers in system to a best practice model at one go
  - Grouping customers so that less critical customers are done first

## Moving to a Best Practice Model..Key Implementation Considerations..!(Operational)

- **What all will it involve-Identification phase**
  - Identification of in-process transactions which are getting impacted
  - Identification of existing interfaces, customizations which will get impacted
  - Changing the inactivated customers to new customers in transactions
- **What all will it involve-Inactivation phase**
  - Inactivation of existing party and account sites
  - Inactivation of accounts
  - Inactivation of existing account and party relationships
- **What all will it involve-Change and Create Phase**
  - New parties
  - New accounts
  - New party sites and account sites
  - New party relationships and account relationships

## Post Implementation Lookouts.. How not to move back to old model and old practices..

- **Customer Creation Standardization and Centralization**
  - Standard procedures must be built around customer creation to avoid duplication
  - Centralization, in case of multi-divisional transformation, will help
- **Restricted Access**
  - Develop view only screens so that customer data is not touched by one and all
- **Selection process**
  - post BP conversion, multiple customers with same names might cause concerns in customer selection
  - search screens which display all the addresses of the customer can be used to facilitate search

# Q & A

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