

ERP/CRM CONNECTION PERFECT MATCH OR IMPENDING DISASTER ?

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Expert Opinion



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Introduction

Simply put, digital transformation for a company is like a long obstacle course. For the person in charge of this transformation, your mission (if you accept it), includes the following:

- Dealing with employee resistance to change
- Choosing software solutions that are intuitive enough to meet the specific needs of every team
- Successfully integrating these software programs into the company's processes with the aim of improving them

Among the software solution conflicts that can occur within an organization is where we find the dilemma between ERP and CRM. On one hand, we have a global operations management tool that can appear rather cumbersome and rigid, but at the same time, aspires to structure and combine the company's processes. On the other hand lies a specialized customer relationship management solution. One that makes it possible to organize commercial management, improve customer relations, provide indicators, etc.

In this E-Book, we will explore the differences, similarities and relationships that can exist between ERP and CRM and help you find the perfect synergy between these two solutions for managing your organization.

Happy Reading!

5 GOOD REASONS TO CONNECT YOUR CRM AND ERP



Desi Scorba,
Sales Lead Representative

If you have both an ERP and CRM solution within your organization, you understand that having these two solutions may at times result in an unintended conflict of interest. Duplicated data points, inconsistent methods of info organization, misunderstandings between sales and the rest of the business on how data should be monitored...

But what if this dilemma could come to an end? Why not bridge the gap between ERP and CRM? In this article, we give you our 5 good



1 Improve Data Quality

How does Data Quality Management sound to you? As its name suggests, Data Quality Management aims to ensure that the data circulating within a company is high-quality. How is this done? By using relevant indicators that help measure this quality. When considering the indicators used to assess Data Quality, the following should be taken into account: Uniqueness (how many different forms of data exist within the IS?) Completeness (is all data recorded?), Consistency (in terms of the different data systems, does all data have the same value?).

Connecting your CRM and ERP is a major milestone in improving your organization's data quality. Interconnecting these two software solutions boosts the circulation of data, and ultimately helps information easily flow between the sales teams and the rest of the company.



2 Easier Information Retrieval for Increased Productivity

“Did you look in the CRM?”. These types of questions are often heard in offices when seeking client follow-up information. By connecting the CRM to the ERP, you ensure that all company data is available on a single interface with uniform file organization. Unifying the data means being able to easily and quickly identify what you are looking for. This saves you valuable time when researching information.



3

Maximum Visibility of all Operations

In order to better anticipate future fluctuations within your company, it is important to have the ability to take a step back and look at the bigger picture. By connecting your ERP to CRM, your ERP finally becomes the control tower for data management within the organization; as it should be. The ERP allows you to obtain a constantly updated status report on employee activity. Production, for example, is now just a few clicks away from knowing how many sales were made last month and making future projections. It's up to you to take advantage of all the possibilities offered by this connection..

This connection also makes it possible to strengthen collaboration between your teams by breaking down the barriers present within the company. Marketing, sales, finance and all other departments can now see the actions carried out by other teams and better coordinate their own activities..



4 An Integrated Sales Team for Improved Responsiveness

Where are we with production? What is the stock situation? What time will the customer receive their order? In theory, your sales force would have to ask these, and many other questions to ensure a smooth and productive customer relationship. Why obstruct your sales force with the limited information available in the CRM when the company has an ERP that is readily available and capable of providing more comprehensive data? With it, sales can answer customer questions without having to contact an intermediary. From logistical follow-ups to the latest price updates, thanks to the connection between these two software packages, the sales force now has improved visibility for better customer responsiveness; all without having to constantly change tools.



5

An Improved Urbanization of Information Systems

Netflix star Marie Kondo will tell you that you have to get rid of anything in your home that doesn't bring you joy. The same is true for your information system! Duplicate data does not bring joy and should be considered useless. Throw it out! The hierarchy of your information system must be clarified so that you can quickly find the data you are looking for. Connecting your CRM to your ERP is a big step forward in the urbanization of your information system.

To learn more about all the other advantages of a connection between ERP and CRM (yes, there is more...), don't hesitate to contact our certified team of experts!

ERP OR CRM: WHO IS THE DATA MASTER?



Kenneth Conroy,
Consultant

The roles of ERP and CRM are often juxtaposed in the administration of a company operating in the digital age. An ERP package covers the entire organization while CRM, a valuable tool for commercial activity, makes it possible to manage entire customer relationships. When it comes to data management a conflict of interest arises between the two.

The question then arises as to who, between ERP or CRM, should lead the way in the distribution of information within the company and among all its stakeholders. Who should “lead” the data? Here we will look into the latest innovations in these two markets and explore this question.



ERP, a “metronome” of data management within an organization

Logic would suggest that the software with the broadest view of the company should be the data master. Because of its operational versatility on various levels, we encourage you to place ERP software at the forefront of data flow within your information system. ERP should have a full-fledged overview of all the organization’s data. If the accounting department has a question about a complex sale, they will refer to the ERP and not to the CRM, as is the case in the scenario where the two tools are not connected.

A Good ERP software offers real data processing that is much more advanced than a majority of CRMs. With an ERP, you can classify, archive and secure your documents in the same way as a Document Management software. ERP solutions also offer multiple data management capabilities (collection, monitoring, analysis, archiving,

corrective actions, etc.). This functional power is one of the main arguments, and a big reason why ERP is considered to be the data master within companies.

Will CRM software soon overtake ERP?

We're talking about it more and more. Major CRM leaders, such as Salesforce or SugarCRM, wish to extend the functionalities of their solution to cover more and more areas of enterprise 2.0. The market for customer relationship management applications is growing steadily (+15% in 2019), while the market for ERPs is stagnating. Why is this happening?

For starters, CRMs are diversifying at a high speed. More and more publishers are offering «enhanced» versions of CRM software. Powered by AI and connected to all customer contact applications, CRMs are collecting and analyzing more and more data than ever before. A prime example of this development is Salesforce's acquisition of Tableau (specialist in analytics and data visualization) in the summer of 2019. Salesforce, the leader in CRM, is taking a significant step



forward in enterprise data management, and this demonstrates its willingness to replace ERP in this respect.

Moreover, we know that customer data is the new black gold for companies. Therefore it comes at no surprise that these solutions are taking an increasingly important place in the hearts of managers, sometimes to the detriment of ERPs.

Should we rely on the rise of CRM and make a customer relationship management software the master of data in an organization?

In our opinion, no! ERP still has a very bright future ahead of it. Of course, some ERP software publishers are bound to disappear because of their inability to evolve quickly enough, but new players such as Odoo have a bright future ahead of them. So be cautious of what the media may say. CRM, like Salesforce, is certainly growing, but it is still far from being able to steal the show from ERP when it comes to data management.

SALES DIRECTOR & CFO: HOW TO BRING THEM BACK TOGETHER WITH ERP



Tiffany Isoard,
Consultant

Within your company, digital transformation is booming and every employee has his or her way of adapting to the new organizational practices this surge brings. On one hand, you have your sales manager who tracks sale progression via dedicated tools with his or her preferred instrument being CRM. On the other hand is your Administrative and Financial Director. He/she must have a broad vision of the company and its market in order to accurately monitor any fluctuations that may occur. ERP software will allow them to have these capabilities.

Two personalities, two responsibilities, two solutions. Sometimes information flows poorly (or not at all) between ERP and CRM. So, how can we encourage them to connect these two solutions for faster and better communication? We have come up with a few lines to introduce this concept to your Sales Director and your Administrative and Financial Director.



To the Sales Director who is afraid to connect ERP to CRM

"I know... You swear by your CRM. Since we've installed the software, you have set up a real all-encompassing customer management system and everything is going very well with your sales teams. You have real-time monitoring, your customer and prospect files are being constantly updated, and information is being prioritized to your liking. Hey, nobody is asking you to change.

However, have you thought about the opportunities that you could unlock by connecting the CRM to our ERP? First of all -- don't worry, you will be able to stay on your beloved interface that you are comfortable with. It is only a matter of linking the CRM data to the ERP. This way, other teams will be able to follow the progress of the sales department and customer files via the ERP. Expect an increase or decrease in activity to align production, monitor

customer purchasing behavior and ultimately improve the focus of our marketing strategy... For you, a connection between the CRM and ERP will allow you to monitor stocks and production, quickly create offers, and improve responsiveness...

What was that? You're afraid that by giving other teams access to your commercial management, we'll mess up your files? Of course, we've considered that possibility. And as far as that's concerned, There's no need to fear, mainly because the ability to access and modify data in the CRM will be controlled. In addition, customer information will be shared based on your specified categorizations. So, even if other employees intervene on your CRM data, the information that will be displayed will be arranged however you want it."

To the Administrative and Financial Director...

"Sometimes it's hard to get along. Of course, our Sales Director is always in charge and swears by his CRM. But still... Why should the customer relationship be put aside when it's completely central to our business? It's time to reconcile and link up the data. Especially CRM data. You'll see how this will make your job much easier..

You'll have visibility into the company's processes and financial



tracking with your ERP. Connecting the ERP to the CRM will give you customer insight like never before. You will be able to follow the whole consumer process with 360° visibility. This is perfect for defining the right KPIs to measure the performance of existing business strategies.

You keep telling us that we need to monitor our analytics. So, why wouldn't we align our budget resources a little more with customer behavior if an analyst of the new data available to us indicates that it's worth it? CRM lets you monitor orders and analyze the habits behind them as well. You will be able to merge these practices where they are needed: human resources, equipment purchasing and so on...

In the end, you'll save a lot of time! The CRM develops an automated customer path: from the moment of first contact to when the invoice is sent out, everything is formalized. This eliminates a majority of repetitive data entry tasks. Therefore giving you more time to concentrate your administrative and financial attention on the tasks that matter the most."

Of course, if you need additional arguments, we still have a whole bunch ready just for you: don't hesitate! !

WHAT IF YOU COULD DO WITHOUT YOUR CRM ?



David Hammond,
Consultant

The CRM is held in such high regard... Everyone in the business world talks about it. “My CRM does this, yours should do that... Have you seen the latest version of this one?”

Is a world without CRM possible? In the age of digital transformation, There’s no way to tell for sure if we can free ourselves from the powerful features of an automated customer journey, or from lead follow-up optimized for our needs. However, you can still grow your business without necessarily having a dedicated CRM solution. Let us explain how.



Why use both when the ERP can fully perform the functions of a CRM?

Who needs a CRM when you have a powerful ERP? Today, most ERP systems have their own CRM module. When compared to a native CRM, these modules generally have less advanced customer relationship management features (although this is changing with new players in the ERP world, such as Odoo), but are simpler to use especially when your employees get used to your ERP's interface.

Moreover, a CRM integrated ERP gives you a 360° view of all your customer information, regardless of which department houses it (accounting, logistics, marketing). This gives your sales force total visibility of the company's activity. No need to juggle between software programs to find out inventory status or reference the

constantly updated product catalog. Other departments benefit as well. In a blink of an eye they know where a customer account is, whether or not a reminder has been made, etc

To learn more about the benefits of using a CRM integrated ERP, we invite you to read [this article written by us.](#)

A complete customer-centered ERP: good examples

CRM can be an excellent alternative to ERP, as long as your organization is totally «user-centric» and does not require complex inventory management or production, etc. But, even for these companies, it may be worth considering ERP implementation as opposed to CRM. In the event of a new offer launch or increased business growth, it's better to be prepared with a software that can cover various needs.

When you want to opt for an ERP solution it is first of all important to clearly define your specific needs. How is your customer journey going? What are some sticking points to work on and what are the customer relationship management features you need to address them? Can outsourced ERPs provide these solutions?



When you are having difficulty accessing your company needs, don't hesitate to consult an ERP provider to assess your problem and determine the most viable solution for your organization.

This is why we have chosen to offer the Odoo ERP solution to our customers here at Captivea. Thanks to its great agility, Odoo is fully responsive to environments of continuous growth and changing needs. Secondly, because one of Odoo's greatest strengths lies in its CRM module, it is fully equipped to meet the vast majority of a company's customer relation needs. Additionally, with all the latest technologies available, it offers exceptional ergonomics for your organization

To explore Odoo in more detail, you can [Read our dedicated articles on the blog or](#), even simpler, request a presentation from one of our experienced consultants.

TRANSITIONING FROM CRM TO ERP: WHO CAN YOU TRUST ?



Celia Jay,
Marketing Manager

You want to transition from a CRM to a complete ERP for increased performance. Great idea! Doing so can greatly improve the flow of data within the company and allow for customer relations to be integrated at the heart of your processes. However, you must proceed cautiously! Making this transition from CRM to ERP requires patience and reflection. Fail to do so and you may run the risk of bringing your project to a halt or investing resources and not seeing any added value in return.

Here are a few tips for moving from CRM to ERP.



Things to watch for when transitioning from CRM to ERP

An integrated management software package will cover all the activities of your company. Moving from a CRM to an ERP means fully including customer relations in the company's global ecosystem. It is, therefore, necessary to analyze your existing configuration in-depth, to determine which ERP will best meet your present and future needs

Let's take the Behring company for example: after having tested CRM, they wanted to opt for a more complete solution in order to gain functional power and manage all organizational activity in a more centralized way. The French manufacturer of new-generation water coolers had extended its customer relationship management software by developing new processes to monitor its machines and coordinate maintenance services.

A CRM can carry out these missions through specific developments. However, this can be expensive and complicated due to considerations such as maintenance and upgrades. A sudden jump to an ERP can also be a challenge. Therefore, It is better to start an ERP deployment

project as you start to reach the limits of your CRM software's capabilities, rather than trying to bend your existing software to meet your needs.

CRM to ERP: which service provider to use?

Achieving a smooth transition from CRM to ERP requires a well-thought-out strategy. Calling on an IT service provider is essential to achieve this transition with speed and performance. But which one??

First of all, it is important to determine the Digital Service Company that will be able to understand your processes. In what ways do you use your current CRM? How do your teams collaborate with this CRM and the various digital solutions present within the organization? Your future partner should have a clear vision of the CRM market and its elements in order to understand the organization's situation.

Then, find a service provider who also specializes in ERP. He must also be familiar with the more general issues related to the information system and any technological bridges that will need to be built, etc. Of course, ask him about more practical aspects, such as the methodology, projected productivity increase and how to reduce the time it'll take to adapt to these new changes.

It goes without saying that the service provider must be able to give you customer references to prove their expertise. Often times, software vendors award certifications to service providers. These certifications are a good way to ensure that the Digital Service Company you have selected is knowledgeable (for example, Captivea has Odoo V12 certification and is also an Odoo Gold partner).



Of course, it is also important that the feeling is mutual among all teams involved and that you share some common values that can help facilitate the exchanges. With an integrator of the human realm, for example, you will have a dedicated contact and not be left with the feeling of just being another number. of being just a customer number. Don't say you haven't been warned...



About Us

Founded in 2007 with the aim of supporting and adding value to company information systems, Captivea now has a staff of nearly 40 people, spread between Los Angeles, Orlando (USA) and Chambéry, Grenoble and Paris (France).

The company operates in 2 major areas. The first being the integration of business management software through the use of ERP, CRM, marketing automation and business intelligence software. The second area includes the development of tailor-made solutions and applications in addition to the implementation of e-commerce sites.

Captivea partners with SugarCRM, Odoo and Mautic to offer its clients market-standard software solutions that are flexible, easy to deploy and simple to use. These softwares are then customized to meet the specific needs of each client.

Thanks to more than 200 clients, ranging from SMEs to major corporations across various industries, Captivea has developed real expertise and a solid understanding of business issues over the years. Its main goal: to develop added value! The method: to put people at the heart of the project and to build a sustainable, trust-based relationship with its clients. Captivea is a team of passionate people dedicated to servicing your information system!

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