Knowledgeone K1

USING KNOWLEDGEONE K1 AS A CUSTOMER RELATIONSHIP MANAGEMENT (CRM) SOLUTION

Using Knowledgeone K1 as a Customer Relationship Management (CRM) Solution

Introduction

I am told that every organization (or at least those with customers) wants and needs a good Client (or Customer) Relationship Management system. I know we do and I know that we have struggled with inferior products for many, many years.

This is why, when we were designing the 'out-of-the-box' functionality of Knowledgeone K1, we made CRM a top priority. We designed it so we could replace our existing CRM with Knowledgeone K1. We also made sure that Xchange K1, our new Knowledgeone K1 import/Export engine, could import all of the database formats that our customers and we needed, (we even surveyed our customers to make doubly sure).

Xchange K1 is the secret to using Knowledgeone K1 as a CRM because it provides the way for you to import all of the data and relationships from your existing CRM system as well as your accounting system and any other system you may have that holds client data. Xchange K1 is the final building block in the Knowledgeone suite and it will be shipped to all Knowledgeone K1 customers in January 2006.

The release of Xchange K1 also means we can finally rid ourselves of our old CRM system and move to Knowledgeone K1. So we share the need with you and we have shared the pain in the past of inferior, badly written, badly designed and difficult to use CRM systems.

So, What Is A CRM System?

A successful business depends upon knowing what its customers want and need and then structuring its products and services to meet those needs.

This isn't about spying on customers; it is about knowing your customers. It is about having an up to date picture of your customers and being aware of their ever changing organisations, staff and requirements.

It is also about keeping accurate records of all of your dealings with your customers. This includes everything from sales to support calls.

Most importantly, a good CRM system provides a single point of entry; a single portal into all your dealings with your customers. A way to see everything 'at-a-glance' without having to troll through ten or fifteen different application systems or engage expensive analysts to extract and reformat data and build unstable, unreliable, difficult to maintain bridges and integrations.

How Does Knowledgeone K1 Make It Easy?

Knowledgeone K1 makes it easy to implement 'your' CRM by:

- Delivering a working CRM system 'out-of-the-box';
- Making it easy for you to change any aspect (without programming) so you can get an exact fit with minimal effort;
- Making it easy for you to import data from any other system;
- Making it easy to use; and
- Making it easy to roll-out and maintain, (all user features in Knowledgeone K1 are thin-client so there is actually nothing to roll out to and maintain on desktops).

How Does Knowledgeone K1's CRM System Work?

Overview

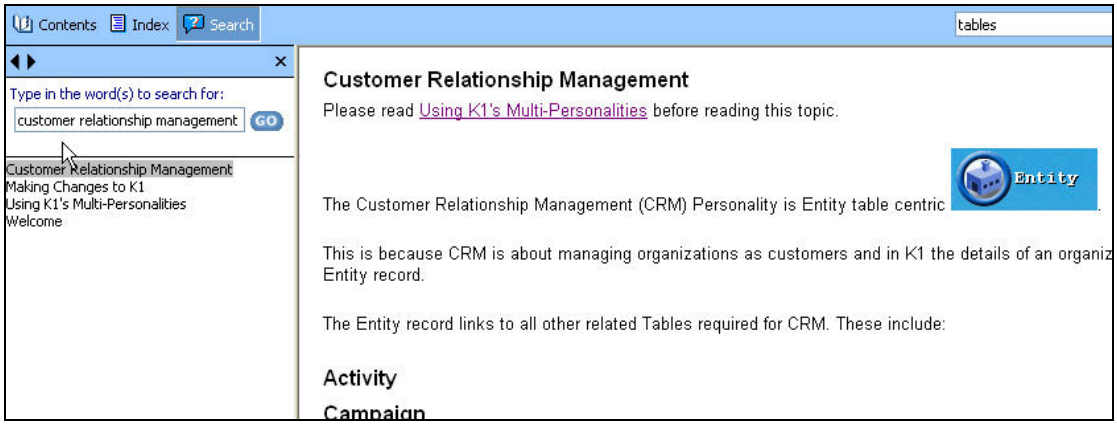
Like all of our 'out-of-the-box' personalities, the CRM personality is single table centric; in this case utilizing the Entity table as the main entry point into all CRM functions.

The Entity table in Knowledgeone K1 is where you maintain details of all the organizations you deal with; each one is defined as an entity in this table.

The nature of Knowledgeone K1's 'single-table-centric' approach means that you can access every related record while within the Entity table. This means that without leaving the Entity table record, you can access all information on your customer including all departments, locations, employees (contacts), quotations, purchase orders, invoices, support calls, notes on all phone calls and meetings and all activities past and pending (e.g., appointments and meetings).

And, the CRM function is ready to use as soon as you install Knowledgeone K1. As are the Activities functions and Notes functions and Help Desk personality. In fact, every function and personality and table you will need has been pre-configured by us so you can begin using the Knowledgeone K1 CRM personality as soon as you install Knowledgeone K1.

Note: *For a detailed reference to Customer Relationship Management in Knowledgeone K1 please access the K1 online help and search on "customer relationship management" as follows:*

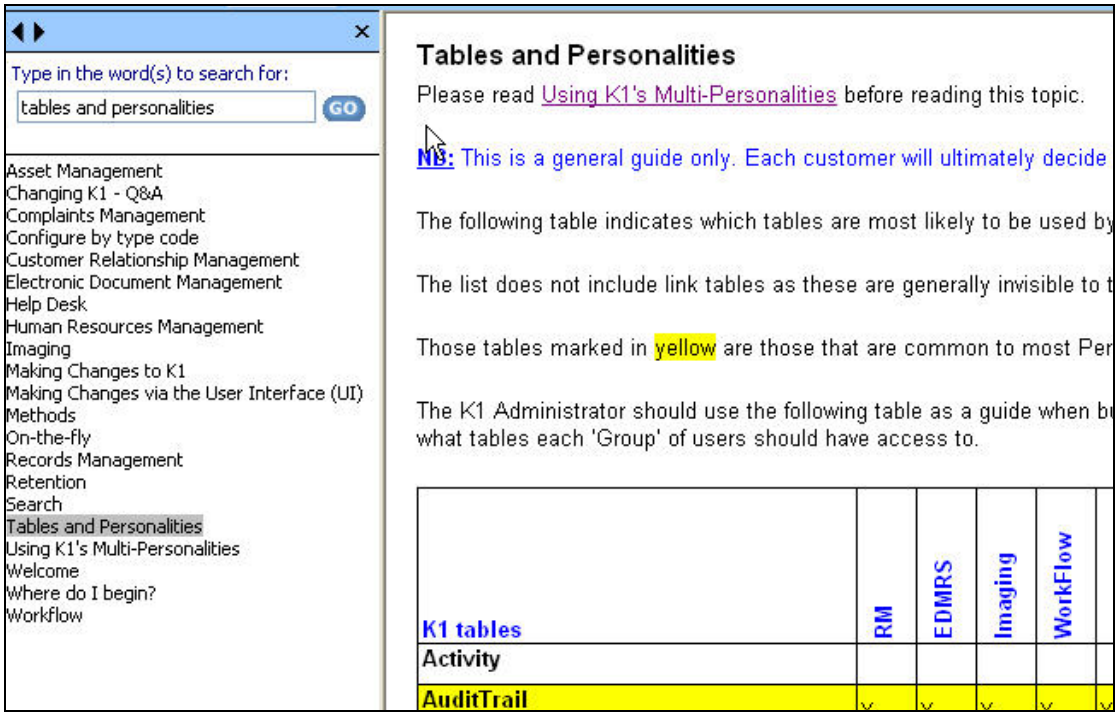


This is a particularly important topic because it clearly describes all of the tables used by the CRM personality and also explains each of the fields and field links in the Entity record.

Which Tables?

There is a diagram in the Knowledgeone K1 online help system showing the suggested usage of Knowledgeone K1 tables by the various 'out-of-the-box' personalities of Knowledgeone K1, including CRM, in an easy to read table format.

Note: *For a detailed reference to handling Tables and Personalities in Knowledgeone K1 please access the* Knowledgeone K1 *online help and search on "tables and personalities" as follows:*



This diagram lists all the tables used by the CRM personality, as does the K1 online help reference mentioned previously, "customer relationship management system".

This is an important point I try to make in each one of our papers on Knowledgeone [K1]. There is an enormous amount of information in the online help system. We chose to put this information in the online help instead of a manual because in our experience (22 years of designing, building and supporting software applications), manuals can never be found when needed. The online help on the other hand, is always there and is just a click away.

Within this paper and others, because they are designed for our customers who have access to the online help, we try not to repeat the information in the online help system and will continually refer you to it by giving the words to search for. Instead, in these papers we try to give you an easy to follow overview of how each personality works so you can more easily gauge how it could be of benefit to your organization.

Using Xchange [K1] To Import Data And Populate Your CRM Tables

Overview

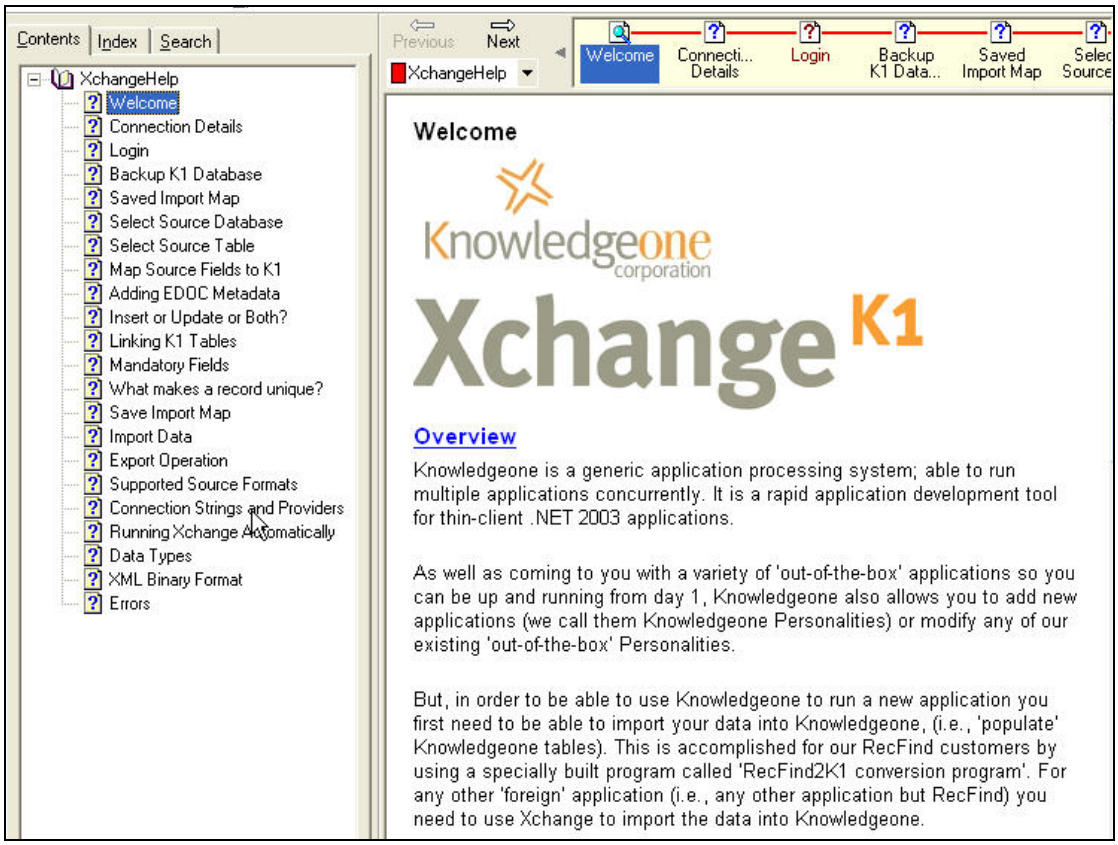
Xchange [K1] is a free product delivered to all Knowledgeone [K1] customers. It wasn't included in the first shipment of Knowledgeone [K1] but will be included in the Knowledgeone [K1] version 1.2 upgrade being shipped to all customers in January 2006.

Xchange [K1] is, like Knowledgeone [K1], a new concept and a revolutionary product. It can import from virtually any source and can dynamically replicate links from the source tables within the target Knowledgeone [K1] tables, (saving you having to do this manually after the import of each table). And you can also use Xchange [K1] to export any information from Knowledgeone [K1] in industry standard XML format.

Most importantly, Xchange [K1] can be run fully automatically as well as manually. This means Xchange [K1] can be used as an object oriented API (Application Program Interface) when you need to import data into Knowledgeone [K1] on a regular basis (say daily or weekly) from other systems. You simply configure your mapping for each system, save and name the map and then use it each time you run an import (or export, you can also save and reuse export maps in exactly the same way).

As I said earlier, Xchange K1 is the missing link and the most essential tool for customers when using Knowledgeone K1 to run multiple applications. It is literally a universal integration tool, able to integrate to any system.

Note: *Please reference the* Xchange K1 *online help system as follows:*



So, How Do You Switch Across To Knowledgeone K1's CRM Personality?

Overview

Unless you are a recent start-up, most of the core data you will need for your CRM system is already somewhere in your organization. It may be in Excel tables, Access systems or other applications' databases (for example in SQL Server or Oracle format). It may also be in your 'old' CRM system (as it is with us).

Some of this data you will need to move over just one time to Knowledgeone K1 and other data will need to be imported into Knowledgeone K1 on a regular basis, for example, accounting or invoicing data.

What Do You Need To Convert First?

I would think you need to first populate the Knowledgeone K1 Entity table and Person table with details of the organizations you deal with and the people (contacts) who work for those organizations.

There is an example in the Xchange K1 help screens of importing this type of data.

Note: Xchange K1 *online helps system, please begin with the Login topic and follow the process through of importing Employee data from an Access database.*

Having the Entity and Person tables populated is a prerequisite to being able to use the CRM personality and perform any CRM related functions such as adding Notes and Activities and Sales Opportunities.

Know The Data And Relationships You Want To Import

Is Your Data 'Dirty'?

Unless you are really unusual, the data you want to import won't be 'clean', won't be up to date and won't be in the form you need it to be in. One of the oldest acronyms in the IT business is GIGO or "Garbage In, Garbage Out". If you import junk then the resulting system will also be junk.

So, for most of you, any import operation must be preceded by careful data analysis, data clean up and data reformatting. You may for example, export selected data (only exporting some of the fields, not all of them) from a legacy system as CSV (ASCII, comma delimited) data and then import, sort and normalize it in Excel. Excel is by the way, in my opinion and experience, one of the finest tools available for cleaning up and standardising data tables prior to importing

Excel is also one of the standard import sources for Xchange K1.

Does Your Data Have Relationships?

Most of the tables you will import will also have relationships or links to other tables. For example, in most CRM systems the Contact table will be linked to the Customer table such that every contact record has a link to a Customer (company) record.

You need to be aware of these links and you need to import these links using Xchange K1 otherwise you will end up with thousands of 'orphan' records. For example, ten thousand contact records not linked to any customer record. Or, in Knowledgeone K1 parlance, ten thousand Person records not linked to any Entity record.

Logically 'Map' your Source Data to Knowledgeone K1 Data Before Using Xchange K1

Xchange K1 is a very sophisticated, flexible and powerful tool but it doesn't read minds. You therefore need to clearly and unambiguously tell it what you want it to do.

This is the same advice we give to our programmers, "Please plan your code BEFORE you begin to code."

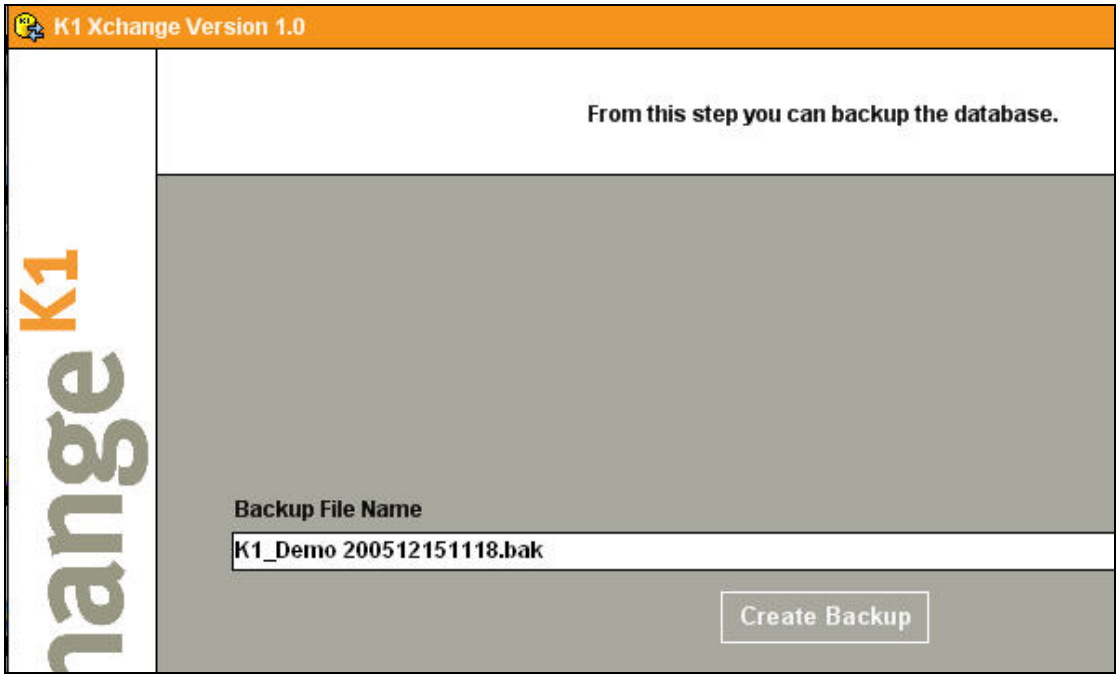
So, please plan your conversion and have a clear picture of what:

- Source tables to import.
- Target Knowledgeone K1 tables to populate.
- What source tables are referenced by the source tables you are importing.
- What fields in the source tables you need to import.
- What Knowledgeone K1 tables and fields you will populate from the source fields. Note that one source field can be used to populate multiple target fields in Knowledgeone K1.

If you are wise, you will again use Excel to document the mapping process, table to table, field to field BEFORE beginning to use Xchange K1.

Backup, Test, Restore

In the first steps when running Xchange K1, we provide an easy, non-technical way to backup your Knowledgeone K1 database. This is a really, really smart thing to do before running any import process.



By first backing up the Knowledgeone [K1] database you can proceed with impunity knowing that if the import doesn't go as planned (and you won't know until you see the error report at the end of the import process) you can easily and quickly roll back any changes made using the Restore process from SQL or Oracle.

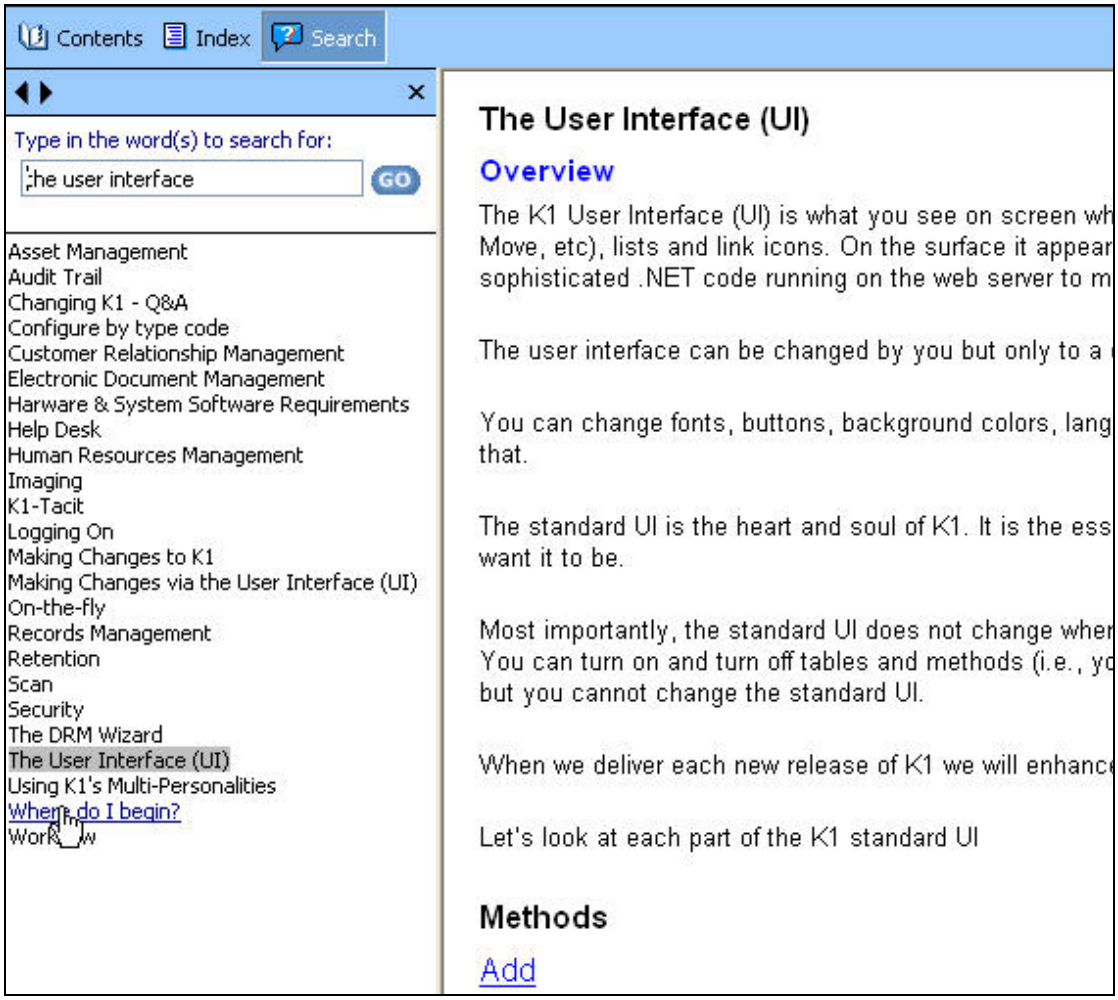
Think of the 

button as being closely related to peace of mind and job security.

Train

One of the really great things about Knowledgeone [K1] is that the same user interface is used for all personalities. And, in most cases this means knowing the standard Knowledgeone [K1] Methods and about 8 to 10 different 'screens' (there aren't really any 'screens' in the traditional sense in Knowledgeone [K1] but I can't think of another term to use).

Note: *For a detailed reference to the user interface in Knowledgeone [K1] please access the K1 online help and search on "The User Interface" as follows:*



So, training people how to use Knowledgeone [K1] isn't difficult and isn't really the problem. You need to train people how to 'run' and use your new CRM personality. You need to set up some policy and procedures once you have the CRM personality ready to go live.

Go Live

There are three critical things to do before going live with any new system.

- Test thoroughly.
- Bring across the most recent data.
- Train and prepare and 'sell' users.

Miss any of these essential steps and you will be in trouble, I guarantee it. I also think that 'selling' users on the new system is probably the most important step. The best system in the world won't work if the users are 'anti'.

So, How Does Some Of This Knowledgeone [K1] CRM Stuff Work?

Overview

The standard 'out-of-the-box' Knowledgeone [K1] CRM personality already includes a multitude of tables, fields, links, functions and processes to get you up and running as soon as possible.

Let's take a brief look at some of the features you can use from the very beginning. We can begin with a view of the standard Entity record and then look at some of the features and links available to you from this record to illustrate how our single-table-centric approach works.

Note: *For a full description of all of the fields and links in the Entity record please refer to the K1 online help system and search on "Customer relationship management".*

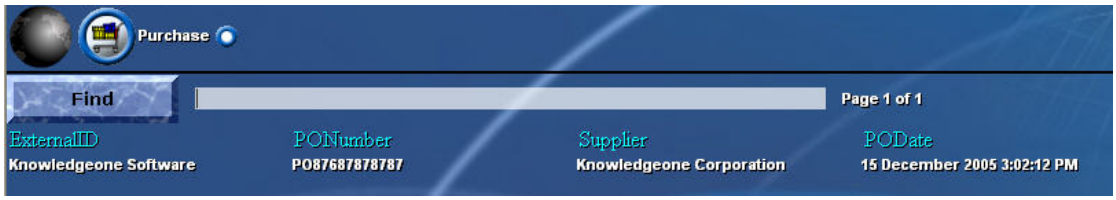
Remember, you can modify the Entity record, adding fields, captions, modify fields, delete fields, change screen sort orders, etc, very easily and very quickly using the DRM. The examples you see below are from our standard design of the entity record, we expect you to want to change it to meet your exact requirements and we make it easy to do so.

Note: *Please refer to the* Knowledgeone K1 *online help system and search on the following for a full description of how to make changes to the K1 Data Model: "The DRM Wizard" and "Making Changes to K1"*

The Entity Record

Purchases

If this entity is a supplier (rather than a customer) this field will link you to the Purchases table where you can view or add or modify details of all Purchase Orders placed.



Remember that you can also change the standard column headings using the DRM.

By selecting this entry and clicking the 

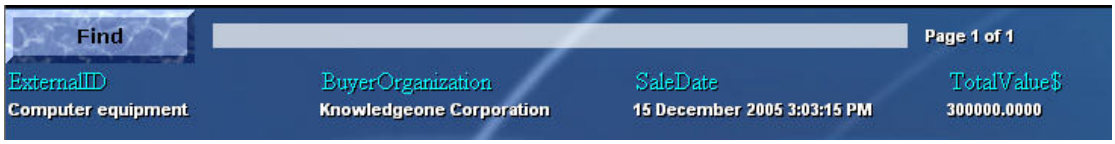
button you can instantly see all the details of any purchase order placed on this supplier.

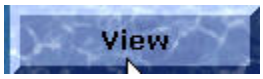
Credit Ratings Assigned

By clicking on this link, you can view all credit ratings assigned to this entity by the various credit rating organizations and you can add new ones.

Sales

If this is a customer, by clicking on the Sales Link you can view or add details of any sales made to this organization as follows:



By selecting the item and clicking the 

button you can display the full details of any sale.

Request For Quotes

If this entity record is a customer, this is where you create and link to any requests for quotations received from this customer.

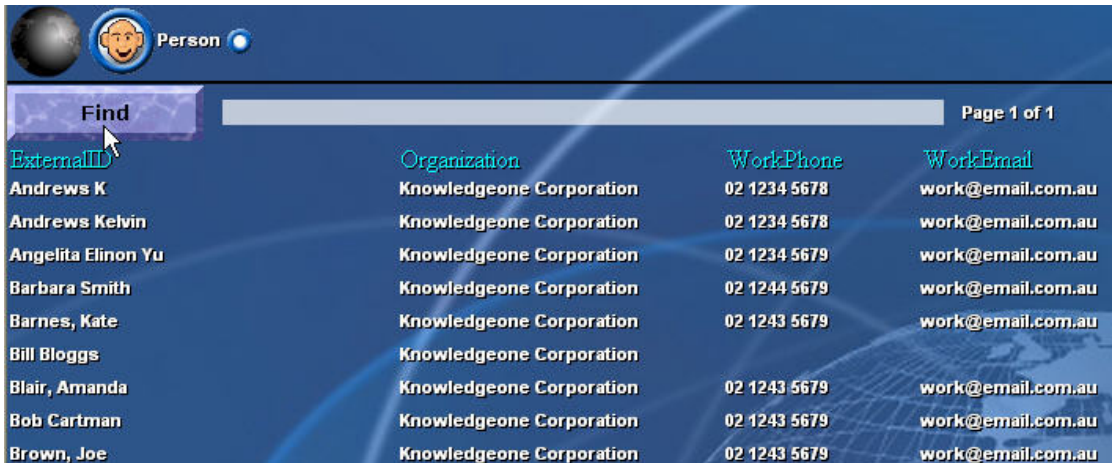
Clicking on each item will display the full details of each request for quotation.

Employees

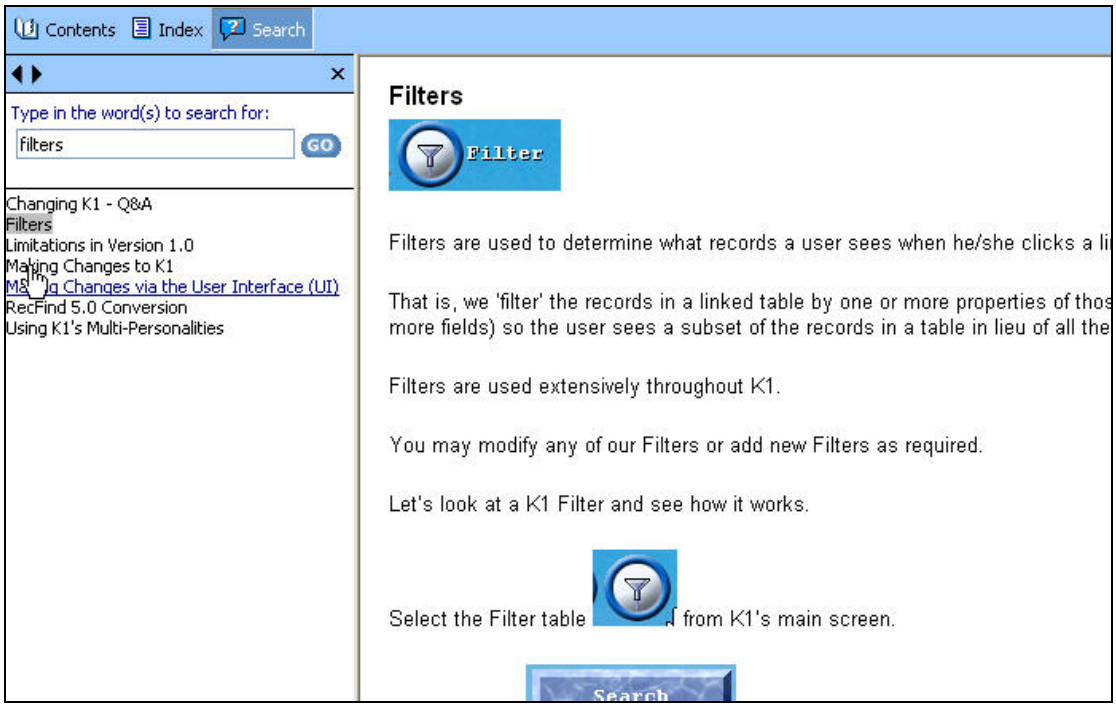
This is where you can add, modify and view all the employees of each organization you deal with. Clicking this link takes you to the Person table and lists all employees of this entity.

Note: The way we list only the employees of this entity is via a Knowledgeone [K1] feature called a Filter. Basically, the filter says, "When the user clicks on the employee link from within the Entity record, switch to the People table but only display those persons that are linked to the starting Entity record."

For example, from the thousands of people records in the Person table, Knowledgeone [K1] has displayed just those that have Knowledgeone Corporation as the employer.

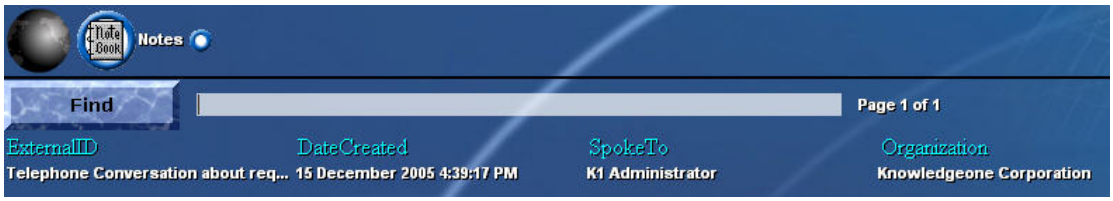


Note: *For a detailed explanation of the use of Filters please refer to the* Knowledgeone K1 *online help system and search on "Filters" as follows:*



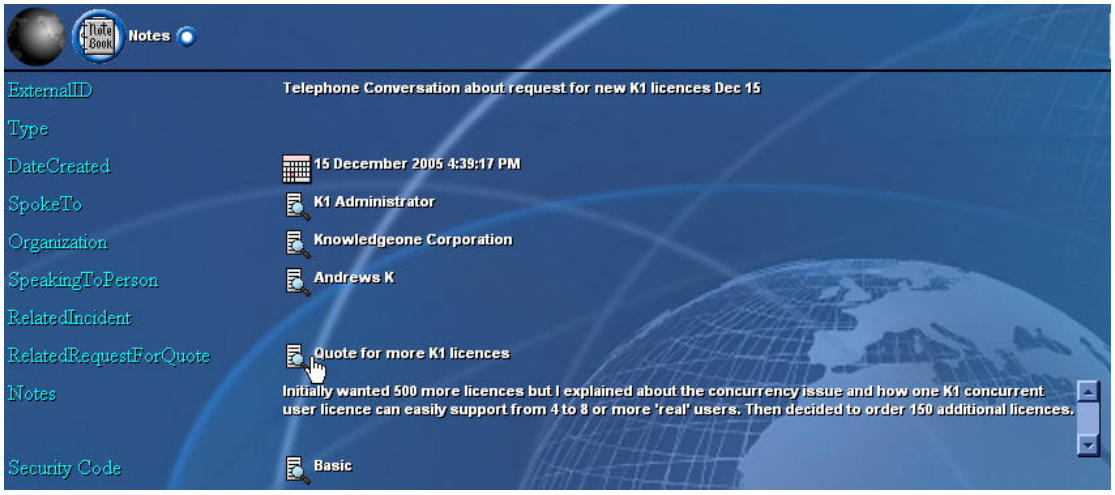
Notes

Clicking on this link allows you to add, modify or view any notes of conversations, meetings, etc about this customer as follows:



Selecting any Note and then clicking the 

button will display all the details of each note as follows:



Note how it shows the person from your organization (SpokeTo) plus the person in the other organization (SpeakingToPerson). The Note can optionally be linked to a RequestForQuote record or an Incident (if you are also using K1 as your Help Desk system – another standard 'out-of-the-box' personality of K1).

The above examples illustrate just a few of the standard links available from within the Entity record. Once again, you can see the power and ease-of-use of the Knowledgeone [K1] single-table-centric approach. Sit in a single Entity record and be able to View and Add and Modify on-the-fly any related information.

Security Groups

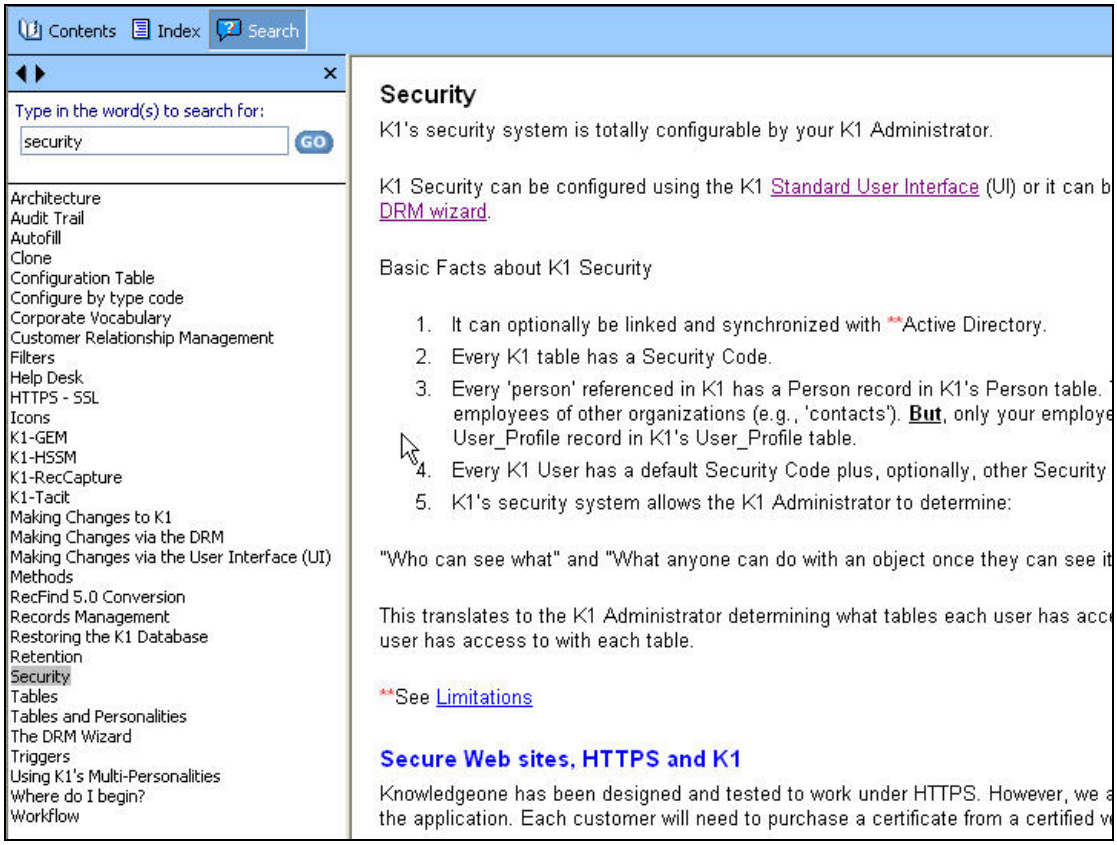
Overview

The ability of any user to see a table or record or field or to be able to Add, Modify or Delete or use any Knowledgeone [K1] standard Method is determined by your Knowledgeone [K1] Administrator when he/she builds Security Groups using the DRM.

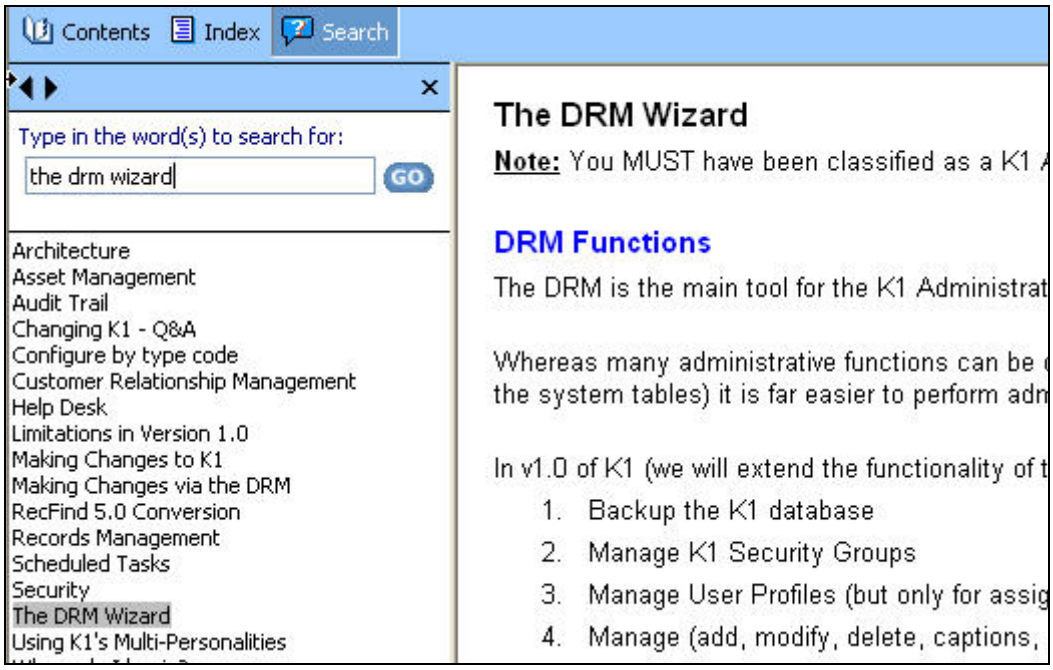
This is very important in the CRM personality (as it is in any K1 personality) because you need to be able to determine who can 'run' CRM, who can see what and who can do what. Some users will just have View rights and some will have full rights, able to Add, Modify and Delete any record.

You decide who has access to what personality just as you decide what records and fields they can 'see' and what Methods they have access to. You have total control.

Note: *Please refer to the K1 online help system and search on, "security" for a full explanation of how to use K1's security system.*



Also search on "the DRM Wizard" for a detailed explanation of how to build and maintain Security Groups.



The User Profile Record

The link between a Security Group and a user is established in the UserProfile record. Every Knowledgeone [K1] user MUST have a UserProfile record and every UserProfile record MUST be assigned to a Security Group as follows:

The Security Group controls everything a user can see and everything a user can do.

Summary

Most CRM systems fail because they are too hard to use, too hard to maintain, too hard to reconfigure as needs change and the data is too hard to keep up to date.

Knowledgeone [K1]'s CRM personality solves all of the above problems when used with Knowledgeone [K1]'s Xchange [K1] Import/Export Engine and API.

- It is easy to use (never any more than 10 standard 'screens' to learn);
- It is easy to maintain (there is nothing to install or maintain on the desktop);
- It is easy to reconfigure (we provide all the tools to modify either the Data Model or any Process); and
- Xchange [K1] makes the one-time and ongoing importing of data (integration) as easy as it can be.

There is no longer any excuse for not having a world's best practice CRM system operating in your organization.

Frank McKenna, CEO