APG Customer Relationship Management (CRM) Background

APG Overview

Armstrong Process Group, Inc. (APG) provides proven and practical process guidance for aligning IT capabilities with business strategy. APG's unique combination of integrated strategic process improvement consulting, customized training, professional development products, and project coaching ensures its clients can practice sustainable development methods.

APG has a comprehensive offering of professional services to provide a complete, integrated program that can be tailored to each organization's unique needs. Our broad and extensive experience in many different business domains and organizational environments allows APG to provide its clients with the knowledge of the critical success factors and typical challenges most organizations face.

APG has partnership relationships with leading vendors and industry standards organizations. These partnerships enable APG to contribute feedback and provide leadership based on our real-world practice with customers.

- Influencing member of the Object Management Group (OMG)
- Member of The Open Group Architecture Forum
- Committer for various Eclipse open-source projects (EPF and MST)

Strategic Process Improvement Consulting

APG provides consulting services to help organizations plan and rollout their process improvement initiatives.

- Organizational/professional development and skills assessment (Open Group ITAC)
- Process definition and process modeling
- Enterprise architecture
- Portfolio/program management
- Systems engineering and software development
- Industry frameworks (TOGAF™, RUP®, MDA®, CMMI®)

Methods, Techniques, and Tools Training – Courseware Tracks

- Enterprise Architecture and Service-Oriented Architecture (SOA)
- Model Driven Architecture
- Business Modeling & Requirements
- Systems and Software Architecture
- Analysis & Design
- Process Improvement and Project Management
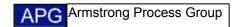- Software Development and Testing Fundamentals
- Tools (Telelogic, IBM Rational, Sparx, No Magic, MEGA)

Products

APG provides a set of products to the business and IT communities for supporting organizational and professional development.

- APG TOGAF Process Library (ATPL)
  - ATPL Plus Govern Solution Architectures (ATPL+GSA)
  - ATPL Plus Rational Unified Process (ATPL+RUP)
- APG "RUP® Prep" certification practice exams
- APG Professional Development Plug-In

Proven ▶ ▶ ▶ ▶ ▶ ▶ Practical ▶ ▶ ▶ ▶ ▶ ▶ Process™

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Opportunity

APG makes considerable, ongoing investments in various marketing activities delivered in numerous channels. Relationship venues include:

- APG corporate presence (APG website and websites of partners, standards organizations, and professional associations, search engine visibility)
- Participation in industry trade events as exhibitors, presenters, and/or attendees
- Participation in industry standards organizations as committers and contributors
- Delivery of APG-sponsored or partner-sponsored seminars and webinars
- Syndication of APG content (presentations, whitepapers, templates, guidelines) on APG website and affiliated websites
- Delivery of instructor-led training (ILT) and web-based training (WBT) to the general public and private clients
- Referrals from partners and past clients
- APG-lead solicitation of new prospects through acquisition of new prospect data lists

Via these diverse paths, APG and its staff make many new contacts and come to establish relationships with many different organizations and their representatives (employees, agents, contractors).

However, recent growth of APG's staff in the areas of administration, accounting, sales, and marketing have made it obvious to APG management that there a number of fundamental issues that need to be reconciled:

- There are not any well-defined processes for handling customer-related data.
- There is no clear understanding of who touches customer-related data, throughout its lifetime, across the enterprise.
- There is no strategy on how to fully leverage APG's customer data in order to achieve APG's business goals.
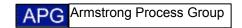
APG's new staff comes from a variety of business backgrounds with different views on how to handle customer-related data. The APG team is also geographically distributed across the United States, yet needs to behave as a virtual, integrated team.

Questions to be Answered

APG management needs to ensure that its staff can rapidly respond to commonly-asked questions regarding how APG interacts with individuals and organizations.

1. Which externally-facing business services at APG touch customer-related data? Which internal business capabilities support those services and also touch customer-related data?

2. Under what circumstances does APG initiate contact with individuals?

3. Under what circumstances do individuals initiate contact with APG?

4. Which training courses has APG delivered at a particular client (and facility)?

5. Which consulting services has APG delivered at a particular client? Who was the client sponsor? What groups of individuals did APG collaborate with?

6. Has APG worked with an individual from a new client that came from a past client?

7. Can APG tell where initial contact with individual was made?

8. Who is responsible for the quality and integrity of customer-related data? What data needs to be secure and private?

9. Has APG completed submitting individuals to the certification register once APG receives client payment? For example, APG submits TOGAF 8 certifications to The Open Group's website as soon as APG has been paid by the client for TOGAF training, since The Open Group charges APG for each individual listed.

10. Who is APG discussing sales opportunities with?

11. Is APG following up with new leads in a timely fashion?

12. Do we know who has downloaded specific APG content from APG's resource portal (myAPG)?

13. Do we know who has taken a particular training course that would be good candidates for business architecture training and consulting? What about past individuals who received TOGAF 8 certification from APG and are interested in upgrading to TOGAF 9 certification?

14. How many different ways has APG touched any particular individual since we first came to know the individual?

15. Has APG submitted the appropriate sales referral documentation for any vendor partner product sales?

16. Does APG know which individuals attended ILT sessions versus WBT sessions?

17. Does APG understand the interests of every individual?

18. Can APG determine what marketing venues identify the mostly highly qualified prospects that lead to the most closed deals most rapidly?

19. Has APG attempted cross-selling or up-/down-selling within any particular account?

20. Which vendor products has an organization already purchased?

21. Who is the vendor sales lead for a particular product at a particular account? Has APG talked with them before?
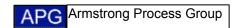
IT's Laundry is Dirty for a Reason

The situation previously described is the most likely explanation behind the poor integration of the underlying IT systems that support APG's website, event registration, attendee management, contact management, and accounting capabilities. There is one data store on APG's website for the myAPG resource portal, which is integrated with online event registration for public events (training and seminars). There is yet a separate attendee management system for tracking students in private, client-sponsored training events.

There is a new cloud-based platform for delivering WBTs that has its own data store. The new WBT platform also allows APG to accept credit cards for both ILT and WBT sessions (which involves passing some customer-related data to APG's external payment processor). To make things even more interesting, the WBT platform vendor has just released version 2 on a significantly different platform that has no migration path from version 1.

APG has a standard, "off-the-shelf" CRM system that hosted by the platform provider that also has its own data store. Some of APG's leads related to vendor partner product sales need to be registered with our vendor partners for incentive tracking. Various partners and their marketing agents provide APG with new prospect data during the execution of content syndication and co-marketing initiatives. Lastly, there is customer-related data also being stored in APG's accounting system.
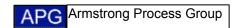
Growing a Startup in the Cloud – London APC 2009
Summary

Cloud computing can offer startup companies a significant competitive advantage when leveraged appropriately. The ability to rapidly provide world-class solutions with low initial investments, that can scale as a company grows, is very attractive. However, effectively implementing mission-critical systems in the cloud is not without its challenges, especially as it relates to corporate culture. This session will discuss how the speaker's company has embraced cloud computing, the successes it has delivered, challenges uncovered, and future plans.

- CRM Integration Business Goals
    - Increase repeat customer sales
    - Effectively communicate with all prospects and customers
    - Increase cross-selling across service and product domains
    - Reduce manual efforts in synchronizing disparate customer data sources
- Real-world lessons on the impact of implementing cloud computing solutions
- Application and data integration challenges
- APG cloud capability overview
    - Material printing (courseware and marketing) – Mimeo.com
    - CRM – SalesForce.com
    - Training Delivery and Learning Management – Mindflash.com
    - Shared filing – box.net
    - Calendar – timebridge.com
    - Others?
- Applications to integrate or port
    - Attendee management (custom SQL app)
    - Resource portal (myAPG)
    - Public event registration (myAPG)
    - Public event calendar (myAPG)
    - Accounting (QuickBooks)
    - Blogging (WordPress)
    - Website (custom ASP and SQL)
- New applications with "cloudy" tendencies
    - Time reporting
    - Contract management
    - Curriculum management
    - Proposal management
- Managing architecture change in the cloud – "You're in the cloud, whether you know it or not"
- How do you govern in a cloud?

- Architecture transition planning activities and cloud opportunities
- Situation
  - Recent growth
  - New staff – geographically distributed
  - Lots of existing customer-related data all over the place
- Still need to do lots of the "heavy lifting"
  - Understand business, data, and application architecture
  - Need to integration cloud applications
  - Need to configured and maintain cloud apps
- Challenges
  - Lack of business, data, and application reference models from vendors
  - Dispersed custom code and configuration settings
  - Unpredictability (and lack of control) of cloud app update schedule
  - Synchronizing updates from different cloud app vendors
  - Lack of integrated security
  - Unclear fault tolerance and disaster recovery issues
- Adoption issues
  - Overcoming fear of perceived loss of control
    - "Where are my apps?"
    - "Where is my data?"
    - "Who is responsible?"
    - "Who do I blame when something goes wrong?"

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