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A- Z Glossary of CRM and Related Terms

Sage CRM

A

Application Programming Interface (API): A source code interface that a computer system or program library provides to support requests for services made via a computer program.

Application Service Provider (ASP): A provider that manages and delivers application capabilities to multiple entities from data centres across a wide area network. A type of computer bureau that provides outsourced software on a shared server over the internet for a fixed monthly fee per user.

ASP.net: A web application framework that programmers can use to build dynamic web sites, web applications and XML web services.

B

Back Office: A term used to describe internally focused administration systems, such as accounting, finance, treasury, human resources, purchasing, sales ledger, purchase ledger, billing and so on. In many organisations these facilities are provided by an enterprise resource planning package.

C

Call Centre: A facility for handling telephone contact with customers. A call centre has the ability to handle a considerable volume of calls at the same time, to screen calls and forward them to someone qualified to handle them and to log calls.

Campaign Management Software: Software that automates the planning, execution and assessment of targeted marketing initiatives.

Client/Server: The splitting of an application into tasks performed on separate, network connected computers, so that two or more computers work together to share processing.

Computer Telephony Integration (CTI): The integration of voice and data networks and their associated applications. It allows a website to be integrated into an existing call centre to provide further information.

Contact Centre: A central point in an enterprise from which all customer contacts are managed.

Contact Management Software: Programs that enables tracking of associates, task lists, calendars and also integrates email and personal file information with histories or interactions.

Cookie: A file created by a website and stored and updated on the visitor's computer. It is used by the website to record data about the user, enabling the production of a customised response.

Customer Data: Customer profile data, including products and services purchase histories, profitability measures, demographic and psychographic data and contact histories.

Customer Event: An event in a customer's life that can trigger opportunities for cross selling. Examples include moving house, marriage, birthday, birth of child, expiration of a subscription or insurance policy, holidays, etc.

Customer Profile: A record of registered preferences and purchasing patterns for a customer, it typically includes product and usage summary data, demographic and psychographic data, profitability measures, contact history across all delivery channels and promotion responses.

Customer Relationship Management: "A business strategy designed to optimise profitability, revenue and customer satisfaction. To realise CRM organisations must foster behaviours and implement processes and technologies that support coordinated customer interactions throughout all customer channels". (Gartner Group.) Customer relationship management is aimed at increasing profits by bringing the right product to the right customer, through the right channel, at the right time.

D

Data Mart: A subset of information relevant to a group of users, which is transferred from the warehouse to a separate departmental database.

Data Mining: Software tools that allow users to examine large volumes of numerical data to discover hidden patterns and cross-correlations that would be difficult or impossible to establish using normal query and analysis techniques.

Database: A collection of files managed by a dedicated piece of software. It may serve one or more different applications with data, including the website. Storing customer information in a database allows a system or website to be more interactive, easily managed, up-to-date and more interesting for visitors.

Deduplication: Removing duplicate records from a database. For instance, J Bloggs, John Bloggs, Mr J R Bloggs all at the same address may be the same person. It is part of the process of cleaning and integrating data.

Direct Mail: A marketing effort conducted exclusively by mail sent to large numbers of potential customers advertising a product or service and soliciting orders.

Drill Down: The ability to move from summary information to detailed data by focusing in on a particular aspect.

E

Enterprise: An entire organisation, including divisions, sub-divisions, operating units, branches, head office and any other related organisational structure.
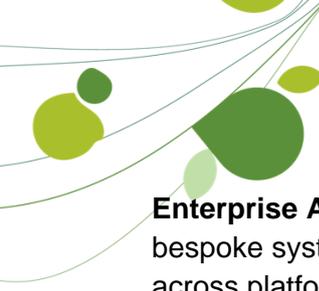
Enterprise Application Integration: A term to describe automating information flow between bespoke systems, packaged business applications from different vendors and websites across platforms and networks.

Enterprise Resource Planning (ERP): An integrated suite of software modules, each of which provides departmental or functional support, but which also supports business processes across departments. ERP can enable enterprises to optimize their business processes and analysis capabilities for improved speed and efficiency.

Extensibility: The ability to add new components, technology and increments to the data warehouse solution. This is a critical capability for the data warehouse architecture and technical architecture.

F

Front Office: A term used to describe customer facing activities supported by systems such as customer relationship management, sales order entry, sales force automation, call centre, helpdesk and so on

Fulfilment: The business process that takes orders from customers and delivers the goods or services on the promised date. Some products, such as software, graphic art, music and written documents can be immediately delivered electronically. Traditional goods and services have to be delivered physically, either by internal resources or a third party.

H

Helpdesk: A specialised call centre that provides assistance on the use of the organisation's products and services. It does not handle sales or billing enquiries.

Hyper Threading Technology: Technology that improves processor performance under certain workloads by providing useful work for execution units that would otherwise be idle.

HTML (HyperText Markup Language): The coding language used to create hypertext documents for the World Wide Web. In HTML, a block of text can be surrounded with tags that indicate how it should appear, for example, in bold face or italics. Also, in HTML a word, a block of text, or an image can be linked to another file on the web. HTML files are viewed with a World Wide Web browser.

I

Integration: The process of bringing together information from different sources. This may involve transactions with the same customer from different transaction processing systems, either because of different geographical locations or because different product groups have different systems; for example an insurance company which has separate departments, each with its own system, which sell life assurance, pensions, health, domestic and car insurance to the same customer.

Internet Protocol (IP): A protocol that allows a packet of data to cross multiple networks.

Interactive Voice Response (IVR): A software application that accepts a combination of voice telephone input and touch-tone keypad selection and provides appropriate responses in the form of voice, fax, call back, email and other media.

J

Java: An object oriented application development language originally written for consumer devices by Sun Microsystems. It is platform independent and allows the creation of Java applets, which can be stored on websites and downloaded to PCs or other network access devices.

K

Knowledge Management: The systematic management of the knowledge processes by which knowledge is created, identified, gathered, shared and applied.

L

Lifetime Value Of Customers: Represents the ongoing income generated from a customer over the long term, less the costs of fulfilment including not the cost of sale, subsequent maintenance, support, warranties, returns and so on.

M

Mashup: A website or application that combines content from more than one source into an integrated experience.

Metadata: Data that is used to describe other data. Data definitions are sometimes referred to as metadata. Examples of metadata include schema, table, index, view and column definitions.

Mobile Commerce: The ability to conduct commerce, using a mobile device e.g. a mobile phone, a PDA, a smart phone while on the move.

Multi Tenant: A service which allows completely independent and separate consumers to use the service as if the service is an instance for their use only, despite the fact that they are sharing the service with many other consumers.

N

Network Computing: A computing architecture in which all programs and data are stored on the server and downloaded across the network into the client computer memory when needed. It has a low cost of ownership because the programs and data are managed centrally from the network.

O

On Demand: A service or feature which is available for immediate use. In most cases the consumer of the service avoids a significant up-front financial investment and instead participates in a "pay as you go" plan - a model which makes on-demand services frequently more affordable for users. On-demand software is typically delivered by an application service provider. This type of service offering is also frequently referred to as Software as a Service.

P

Plug-in: A program that uses a web browser's application programming interface. Each plugin is browser- and platform-specific and plug-ins are stored locally, on the same machine as the browser. Common examples of plug-ins are those that allow the display or playback of special file types such as animation, audio or video directly in the browser window.

Product Configuration Software: Software that allows customers to customise a product or service to suit their own particular requirements.

R

Real Time: 'Instant' computing in which a system accepts updates whilst carrying out transactions and queries. In order for a link to another system to be real-time, both systems must be available simultaneously.

Response Time: The time taken by the software to execute a command issued by the user. This is critical when customers are visiting websites, configuring products or services and accessing internal systems. It should be less than five seconds and preferably under one second.

Routing Software: Software that directs customers to agents with the relevant skills and information needed to assist them. The customer profile database is queried, in real time, for data and instructions. The routing script uses this information to instruct the call centre telephone system how to route the customer.

Really Simple Syndication (RSS): A means of distributing dynamic content to subscribers of that content.

S

Sales Force Automation: Software that supports the sales force by automating much of the routine work throughout the sales process; including targeting, lead qualification, meeting scheduling, diary management, contact reports, reporting, follow-up, to do lists and forecasting amongst other tasks. This enables members of the sales force to concentrate on managing and developing the customer account by widening and deepening the relationship, introducing them to new products, designing new customer-centric processes, setting up collaboration, joint product development, etc.

Scalability: The ability to increase database size or the number of users without losing performance.

Service Oriented Architecture: An application architecture that provides patterns for design, development, deployment and management of a business application infrastructure.

Software as a Service (**SaaS**): A software application delivery model where the vendor both develops and operates the application for use by its customers over the internet. Customers do not pay for owning the software itself, rather they pay for using it.

Switching Costs: The hidden costs incurred when switching from one product to another in the marketplace.

T

Touch Points: Customer-facing parts of the organisation, including relationship managers, sales force, branches, call centres, interactive voice response systems, websites, interactive television, automated teller machines, electronic mail, letters and fax.

U

User Interface: The intersection of the technical aspect of a system and its users. A business' homepage is an example of a user interface, as is any other webpage hosted by the business

W

Web Extensions: Java or ActiveX applets that extend the functionality of internal business systems and enable managers, employees, suppliers or partners to access the systems directly.

Web Self-Service: Electronic support which allows customers and employees to access information and perform routine tasks over the internet, without requiring any interaction with a representative of an enterprise.

Web Server: The server refers to the host of the information on the web. Software that runs on the server side is used to manage the information on the server.

Web Services: A software component which can be accessed by another application through the use of generally available, ubiquitous protocols and transports.

Wide Area Network (WAN): Connects remote computers or networks together, by means of public or private data communications networks or the internet.

Wireless application protocol (WAP): A protocol for converting web pages into text for display on small screens such as telephones.

X

Extensible Mark-Up Language (XML): A language for the creation of information formats and data on the World Wide Web and intranets.

About Sage CRM

Sage CRM is an easy-to-use, quick-to-deploy Customer Relationship Management (CRM) solution comprising sales, marketing and customer service automation. Award-winning Sage CRM equips sales, marketing and customer service teams with the tools they need to find new customers, close sales faster and build lasting, more profitable relationships across all channels.

The Sage Difference

- The leading supplier of SMB business applications in the world*
- The leading supplier of CRM solutions to SMB organisations
- Over 5.8 million customers
- Over 14,500 employees
- Over 30,000 Sage-certified partners specialising in business applications
- Direct presence in 26 countries
- Relationships with over 40,000 accountancy practices
- 28 year's experience

*Source: AMR Research, 2009, The Global Enterprise Application Market

Further Information

Further information on Sage CRM and SageCRM.com can be obtained by contacting your local Sage office or certified Sage Business Partner.

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Insert BP contact details where appropriate