

# Unlocking a holistic view of your Installed Base

Why you need to look beyond your CRM, ERP or FSM



Leveraging just the CRM (Customer Relationship Management) or FSM (Field Service Management) system alone for a holistic view of the Installed Base and to generate actionable insights may not be sufficient for several reasons:



## 1. Limited Data Scope:

- CRM systems typically focus on customer interactions, sales, and marketing data. FSM systems are more oriented toward managing field service operations.
- Neither CRM nor FSM system captures the full spectrum of data related to equipment performance, usage patterns, or specific technical details of the installed machinery.

## 2. Incomplete Customer Lifecycle View:

- A comprehensive understanding of the Installed Base requires insights throughout the entire customer lifecycle – from initial purchase through installation, operation, maintenance, and potential upgrades.
- CRM and FSM systems typically do not cover all these stages and don't provide a seamless flow of information across them.

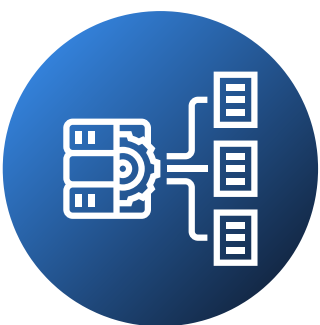


## 3. Data Silos:

- If CRM and FSM systems are not integrated with other critical systems like ERP (Enterprise Resource Planning) and CLM (Contract Lifecycle Management), data will exist in isolated silos.
- Lack of integration can lead to data entry inconsistencies and difficulties in maintaining a coherent and accurate view.

## 4. Technical Details and Performance Metrics:

- FSM systems may track service history, but they don't provide sufficient insights into the technical specifications, configurations, or real-time performance metrics of the installed equipment.
- Detailed technical data is crucial for predictive maintenance, product improvement, and overall operational efficiency.



## 5. Homegrown Databases:

- Many industrial OEMs use homegrown databases to store proprietary or specialized information. Integrating this data with CRM or FSM systems can be challenging but is essential for a complete view.
- The homegrown databases may contain critical details about product configurations, customizations, or unique features.

## 6. Comprehensive Reporting and Analytics:

- Generating actionable insights requires a broad set of data for comprehensive reporting and analytics. CRM and FSM systems are not designed to be analytics platforms, and can't typically offer the necessary flexibility or depth in data analysis.
- To derive meaningful insights, data from multiple sources, including financial data from ERP and contract data from CLM, need to be considered together.



To achieve a truly holistic view of the Installed Base and derive actionable insights, integration of CRM, FSM, ERP, CLM, and other relevant systems is imperative. This integrated approach ensures that data flows seamlessly across the organization, providing a comprehensive understanding of customer interactions, operational performance, contractual obligations, and technical specifications. This, in turn, enables more informed decision-making and improved customer satisfaction.