CUSTOMER IDENTITY AND ACCESS MANAGEMENT AND YOUR CRM SYSTEM

INTEGRATING IAM TO YOUR CRM IS A POWERFUL BUSINESS DRIVER AND GIVES YOU CONTROL OF YOUR EXTERNAL USERS (LEADS, PROSPECTS, CUSTOMERS, CONTRACTORS, VENDORS, AND PARTNERS).

UBISECURE WHITE PAPER

INTRODUCTION

A Customer Relationship Management (CRM) system is the beating heart of an enterprise sales team. CRM is the central repository of your customer information. Lead generation efforts create new contacts within the CRM system. These leads are then carefully cultivated into paying customers. The businesses that deal with a handful of customers can make do with Excel sheets or other manual tools, but any business that has experienced the growth to a SME level has likely felt the need to invest in a real CRM solution that allows effective management of leads, prospects, and customers.

CRM systems are used by many different user groups. Sales, customer services, and marketing departments create, modify, update, and remove records in the CRM database. The accuracy of the data in the CRM system has extremely high importance to both sales and marketing efforts of the company.

Inaccurate or outdated information within the CRM can directly translate into inefficiency of your sales efforts and marketing campaigns. The correctness and accuracy of data is a key driver for integrating an Identity and Access Management (IAM) solution into the CRM system. A well planned and executed IAM to CRM integration provides double benefits by improving the CRM data accuracy and quality, while reducing the administration overhead of contact information. An IAM solution for external users can enable a tiered delegated administration model, where the customers themselves have access to self-service workflows for registering, creating new identities, inviting users, and authorizing users. These self-service functions can dramatically reduce the customer service desk costs while improving customer satisfaction and loyalty.
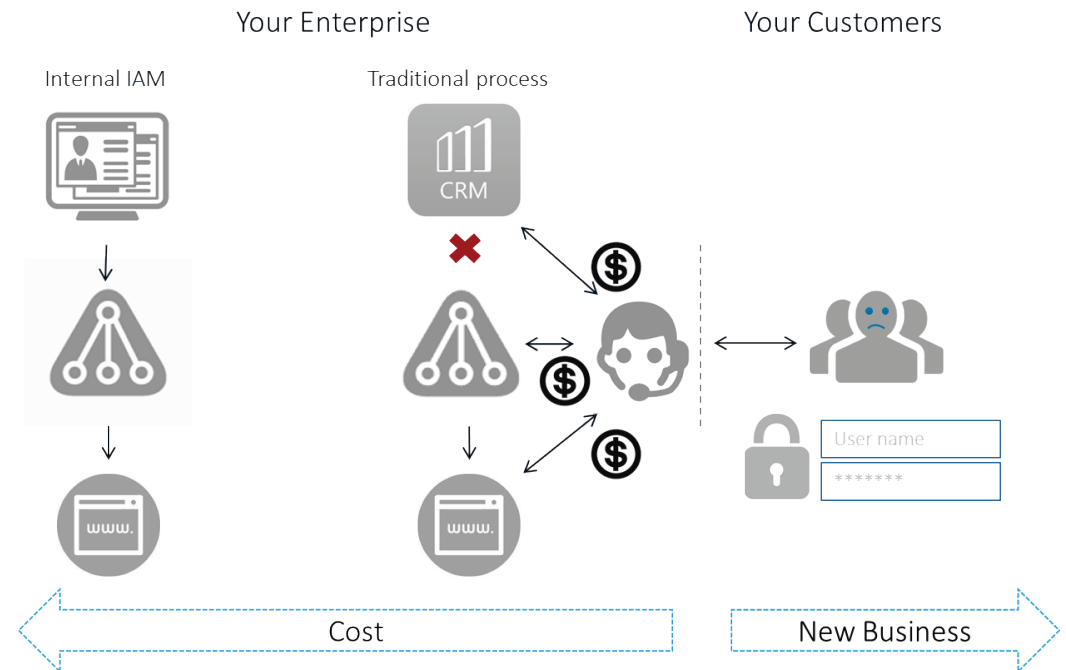
The quality of data has added benefits beyond sales and marketing. In many cases, the CRM data is being processed with analytic tools. The analysis results are then used as basis for strategic initiatives and operative plans. Poor data quality at the outset is likely to have a negative impact on the quality and effectiveness of these plans and actions.

"Customer data typically degenerates at 2 percent per month or 25 percent annually"
- Richard March, Database Marketing & Customer Strategy Management vol 12, 2004

THE DIFFICULTIES WITH TRADITIONAL MODEL

Traditional IAM systems deployed by enterprises concentrate on provisioning the employee identities from a Human Resources (HR) system to relevant repositories within the organization. Internal IAM solutions are mature and have been around for a long time. Internal IAM enables organizations to effectively manage the identity and authorizations of an employee. Due to its nature, internal IAM does not enable organizations to generate new business, nor improve intangible aspects of the outward facing business such as customer satisfaction or loyalty.

It is difficult or impossible to deploy an internal IAM system (based on the processes for employee management) to handle the management of identities and roles of external users, such as customers and partners.

In the example above the provisioning process of an internal user is fairly straightforward. However, the situation changes dramatically when the scope turns to management of external users. With external users it is either difficult or impractical to standardize on a single process, infrastructure or authentication mechanism, as the demands of the business typically require a high level of flexibility. This flexibility is the base of the ease of use (and hence satisfaction) of the customer.

Managing the identity of leads, prospects, and eventually customers in the CRM turns into successful business, while a well-designed IAM to CRM integration minimizes the cost of this management and improves the user experience.

In addition to leads and customers, the external users may also include partners, contractors, vendors, shareholders, etc. Effective IAM integration allows to securely and selectively offer access to these online services from outside.

The lifecycle of a customer typically starts with marketing. Marketing campaign generate leads, that are qualified and handed over to sales. Sales teams work to convert leads into opportunities and eventually customers. Upon a successful sale the CRM is updated with contract information and managed throughout the duration of the relationship.

Over time the relationships, organizations, and people in the customer base change and data quality in the CRM erodes. Year to year as much as 25 percent of the contact data can be outdated as employees of your customers will change responsibilities, move to other companies, retire, etc. This, as well as the management of the freshness of the data is a challenge as a sales organization has limited visibility into the customer organizations.

With a stand-alone CRM system the managing of external online users manually is difficult and time-consuming. Each entry needs to be added by the IT department, sales, or the customer service desk. In some cases obsolete registered accounts may linger within systems with access privileges even if the user has moved on, creating a potential security risk.

IAM TO CRM INTEGRATION

Modern CRM systems have extensive Application Programming Interfaces (APIs) to facilitate integration of third-party products or solutions into the CRM. The IAM solution can be integrated to the CRM using these APIs. These APIs allow several ways to manipulate the data stored within the CRM, but for IAM integration purposes, the need for extensive API usage or integration is not necessary, making the integration effort fairly quick and efficient.
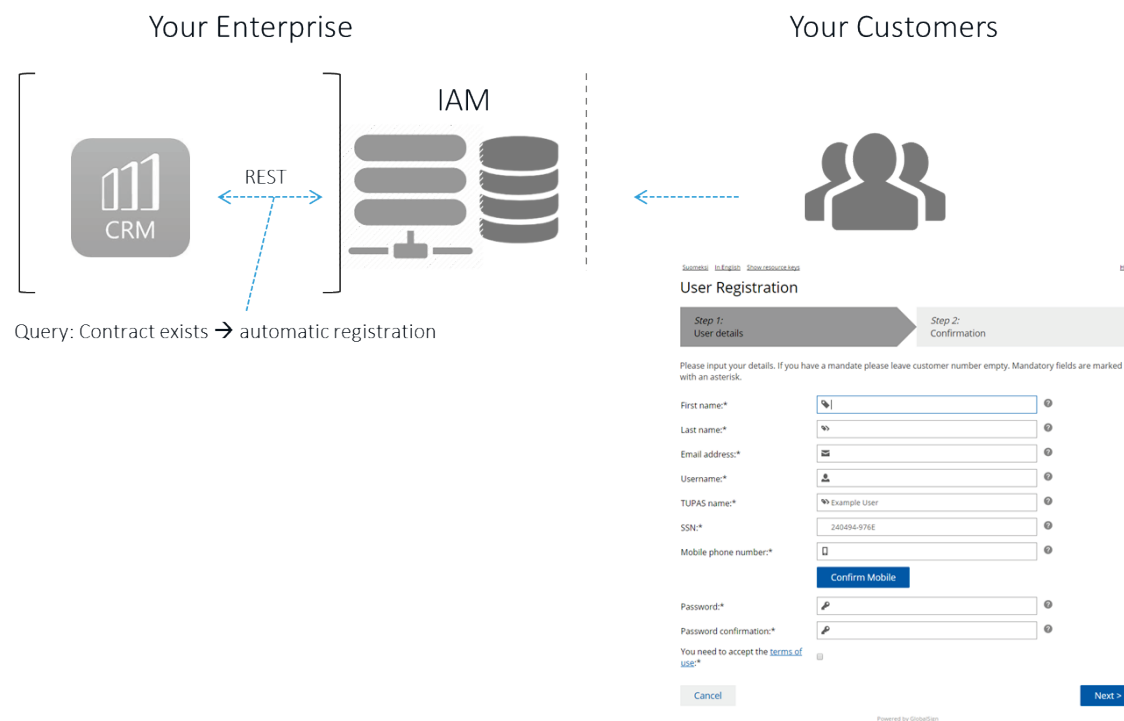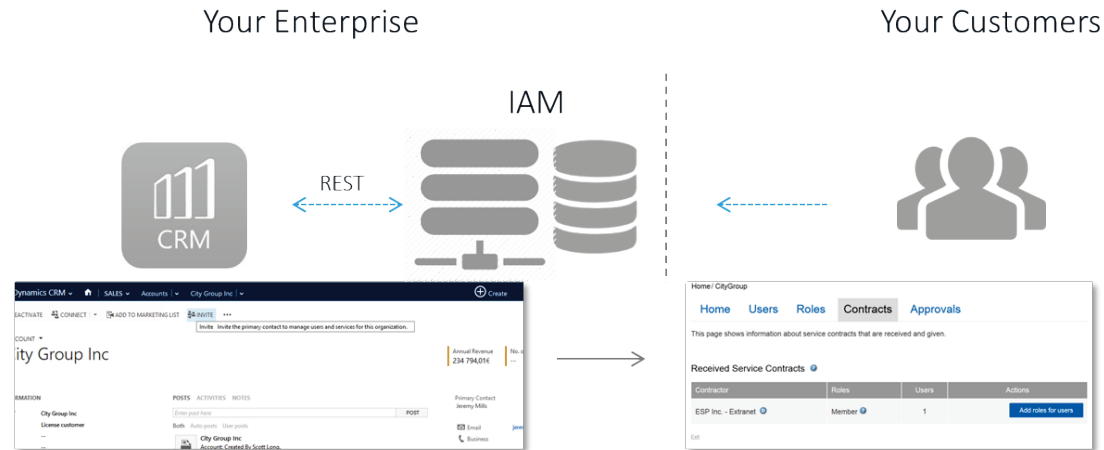
TYING THE IDENTITY TO THE CONTRACT LIFECYCLE

The main use case of the IAM and CRM integration is to tie the contract lifecycle of a customer to the identity lifecycle, or access management seamlessly. If the access management solution is aware of the contract status, accurate access decisions can be made based on this information. This integration fixes the abovementioned security loophole of obsolete user accounts. This process can be automated with the integration between the IAM and the CRM system.

An additional benefit from this IAM-CRM integration is the ability to automate the customer registration process. When an IAM solution can verify automatically from the CRM that a contract exists, online registration becomes much smoother for the customer organization. Removing obstacles to customer on-boarding is a powerful business accelerator. Customers can be empowered to manage their own organizational accounts so that once a customer organization is registered they are issued an administrator account that allows the customers to manage their own identities and authorizations using the workflows provided by the IAM solution.

Your Enterprise

Your Customers

IAM

REST

Query: Contract exists → automatic registration

INVITATION PROCESS

In the traditional model the customer registration within online services is less than straightforward. One way to lower the threshold this creates is to use an invitation function within the CRM system. During a sales call or a customer visit, the sales manager can simply hit an "Invite" button on the CRM interface - the integration with the CRM and the IAM takes care of the rest. This allows an automated way to direct external users to the self-service portals, and create both increased efficiency and cost savings in the business critical customer acquisition process.

These invitations are a powerful sales and marketing tools that can also be sent to multiple customers at once, or to all of the customers via batch functions.
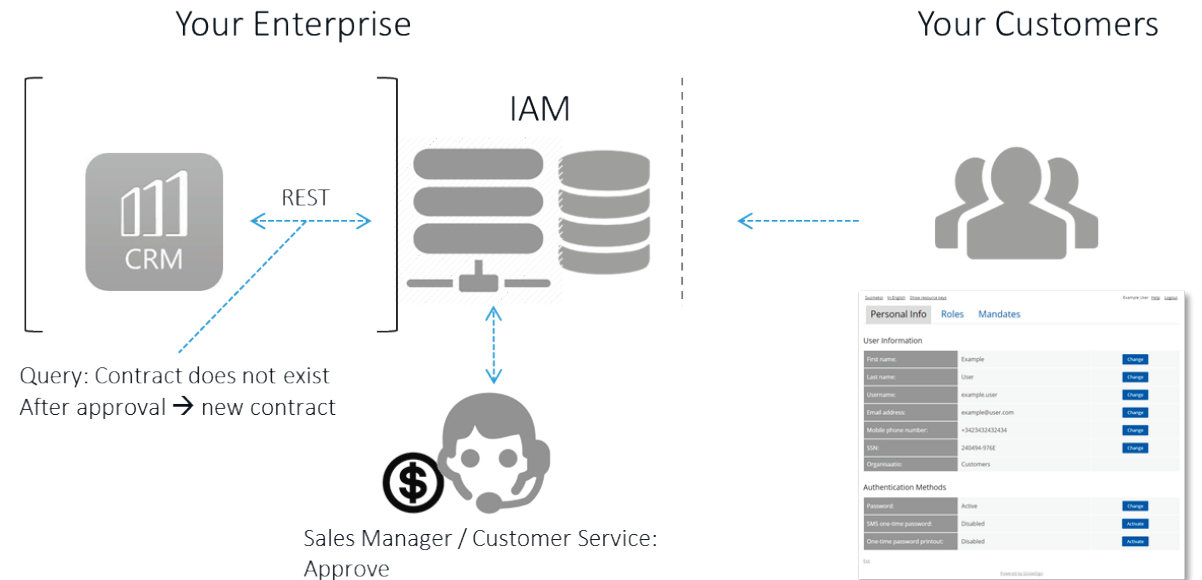
ACQUIRING NEW CUSTOMERS

The cost of acquiring a new customer typically has a substantial impact on the margins of any business. High-volume businesses in particular cannot sustain a high cost of customer acquisition. Generally, all options that reduce the friction of converting a lead into a customer are favourable – even more so if the conversion happens through self-service. Cost reduction is directly visible at the bottom line.
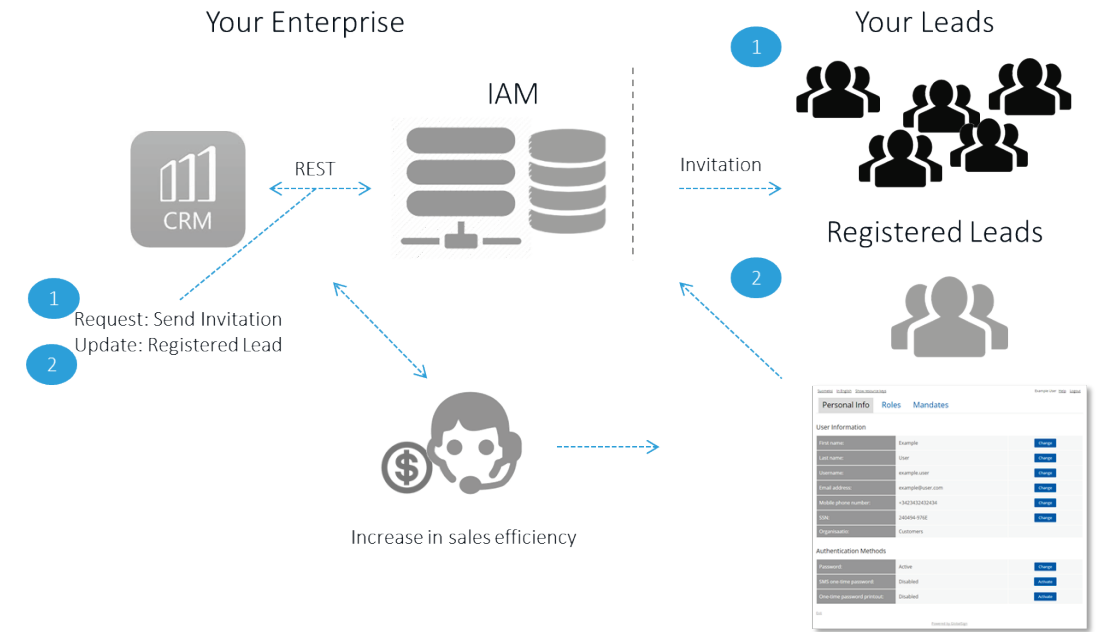
External IAM provides the creation of an online registration process, where self-service workflows are used to register new customers. Automated verification of customer data (phone number, e-mail address, and identity) during registration enhances the CRM data accuracy. The registration request can be automatically approved and entered into the CRM, or alternatively it is possible to further verify and manually approve the customer data by a sales manager or customer service desk.

Your Enterprise

Your Customers

IAM

REST

CRM

Query: Contract does not exist
After approval → new contract

Sales Manager / Customer Service:
Approve

The sales teams' process of engaging leads and increasing lead scores within the CRM can also benefit from the CRM and IAM integration. Often leads are captured from various sources (online marketing, exhibitions and events, social media campaigns, etc.) In case the lead information within the CRM includes a qualified e-mail address (preferably with something else than a public webmail address) an invitation can be sent to the prospect to register to the online service. The IAM to CRM integration can handle this automatically, or sales managers can review leads and send individual invitations to the more attractive leads.

The CRM indicates to the IAM that an invite needs to be sent to the lead through the REST API. The IAM system sends an invitation to the lead with a registration link embedded into the message. If the customer registers to the online service, the IAM indicates to the CRM of this through the REST API, and the lead score can be automatically updated based on your processes. This information can be used by the sales organization to target prospects who have already indicated their interest towards the online services. The IAM system authorizes the leads to access the services with a role (example: "lead") that can be tracked with the Business Intelligence (BI) system provides further information about the lead.
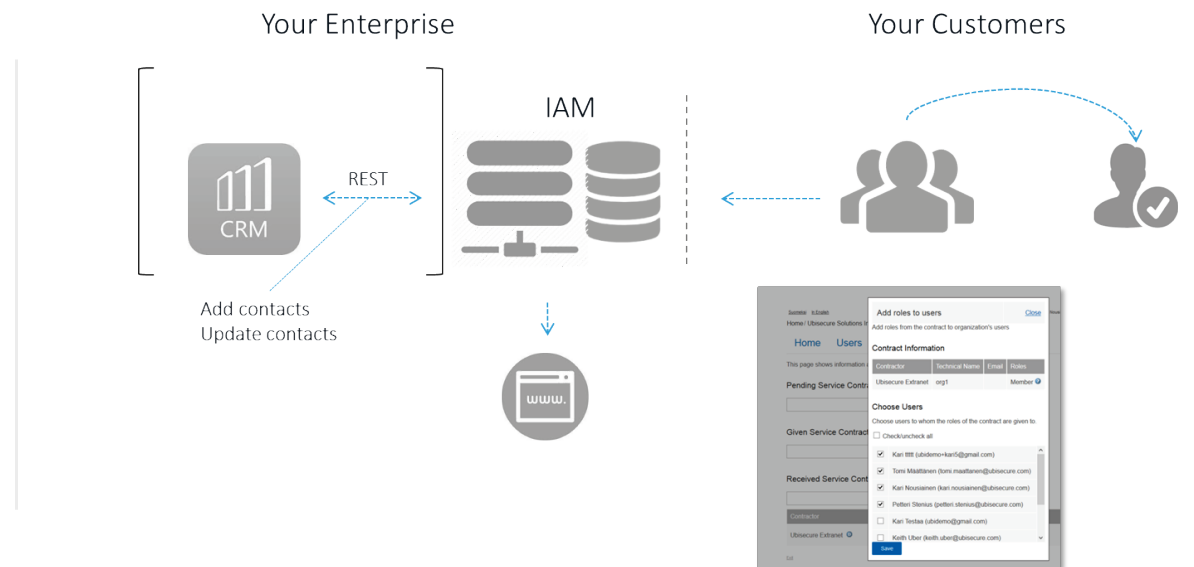
INCREASE EFFICIENCY IN SALES AND MARKETING PROCESSES

One of the constant challenges is the deterioration of customer data. When the responsibility of maintaining accurate and up-to-date customer contact information is within the sales department, the quality of the data inevitably deteriorates as time progresses. For the sales manager, there is limited visibility into the changes within the customer organizations. While the CRM data is of extreme importance to the sales organization, the day-to-day sales tasks sometimes mean that updates may get lost on post-it notes, forgotten, or contact information updated incorrectly.
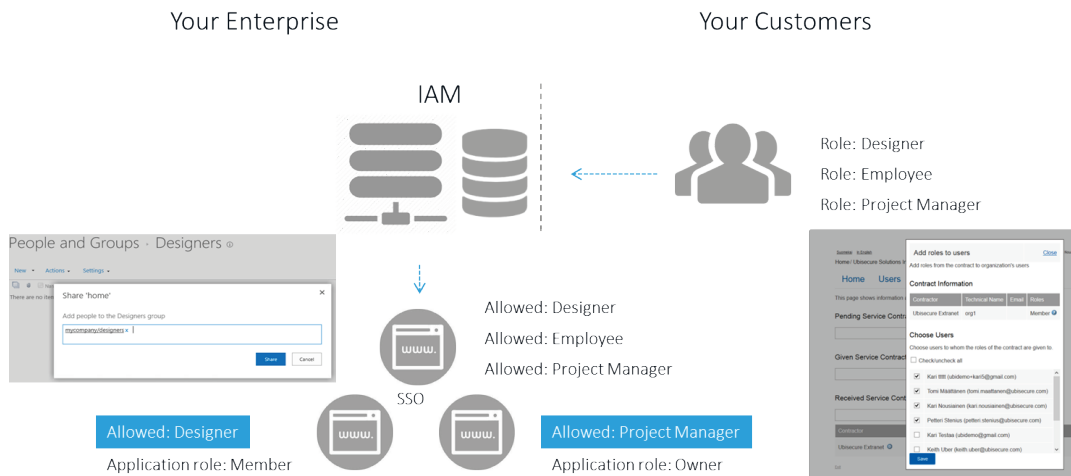
Year over year a certain percentage of the CRM data becomes obsolete. Depending on the number and type of customers this percentage number will vary. Some studies show that as much as 25 percent of CRM data obsoletes annually. This means less effective marketing and consequently suffering sales. Improvement of CRM data quality has an immediate and direct impact to the bottom line.

Integrating the CRM with an IAM solution that provides external user management capabilities enables your organization to improve the quality of the customer data considerably. The IAM solution allows your customers to manage their own identities and authorizations. This way the customer organization is responsible for updating the information that is sent to the CRM automatically through the REST APIs.

An external IAM solution can also improve marketing efforts. As the IAM solution manages the access to the online services, it always has up-to-date information on who is responsible for what within the customer organization. This up-to-date access information allows marketing to address the correct contacts within the customer organizations with pinpoint accuracy. As the authorizations based on roles are managed by the customer organization, the information is always accurate and up-to-date.

The IAM solution is also capable of translating business oriented roles that are easy to understand to application roles used by the customer-facing online service or application. This helps your customers assign appropriate access privileges easily, without wondering what the "member" application role actually means.

CONCLUSION

External identities are key assets of any business. Leads represent potential new revenue while existing customers are potential upsell opportunities. External identities are the soil on which you grow your business. If your organization has externally facing online services, implementing an IAM solution will help you in multiple ways. The master data of the customers and leads is stored in your CRM. To get the best results from your lead generation efforts and existing customers, the IAM solution improves your effectiveness, reduces cost, and makes accessing your online services and applications easier.

While you would not want to allow your customers to access your CRM directly, the IAM solution can be used to empower your customers, and at the same time improve the quality of your customer master data. Lowering the amount of outdated or incorrect customer information from 25 percent will empower your marketing organization, improve your sales efficiency, and eventually impact on your bottom line - positively.

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THERE ARE BILLIONS OF ONLINE AND MOBILE IDENTITIES AND THEY EXIST IN FRAGMENTED DOMAINS, SEPARATE ECOSYSTEMS DESIGNED FOR INDIVIDUAL PURPOSES.

WE SEE A WORLD OF DIGITAL TRANSFORMATION DRIVEN BY THE NEED FOR CUSTOMER/USER SERVICE. KEY TO THAT PROCESS ARE THE TENANTS OF SECURITY AND SIMPLICITY. SERVICE PROVIDERS ARE LOOKING TO EVOLVE, EMBRACE AND EMPOWER THEIR USERS, AND IN DOING SO INCREASE THE EFFICIENCY AND PROFITABILITY OF THEIR CUSTOMERS.

THE ABILITY TO OUTSOURCE IDENTITY, LEVERAGE THE SECURITY OF PROVEN PLAYERS, AUTOMATE THE MAINTENANCE AND ONBOARDING OF NEW IDENTITIES IS KEY TO THE EFFICIENT AND COST EFFECTIVE IMPLEMENTATION OF A DIGITAL TRANSFORMATION STRATEGY.

UBISECURE HAS PROVEN CAPABILITIES TO PUT IDENTITY AT THE BEGINNING OF EVERY DIGITAL TRANSFORMATION.

Simon Wood

Group CEO, Ubisecure

UBISECURE™

ABOUT UBISECURE

Ubisecure is a global Identity & Access Management software and cloud services provider. Ubisecure technology makes using online identities easier, safer and more private for consumers. It helps businesses improve user experience and reduce costs through increased customer engagement, loyalty and insight and it helps service providers benefit from simplified registration, login and attribute sharing from the rich identities already being used online. It helps create trusted connections be-tween digital services, devices and mobile identity. When these modern aspects of identity management are combined, Ubisecure enables the true potential of digital business. The company headquartered in Finland works through a network of local and global system integrator partners and has offices in the UK.

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