

Costing Model - FRA preparation

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Issue

Syensqo requires a CRM system as part of its sales lifecycle and uses salesforce.com to meet its current CRM needs.

The current Syensqo CRM architecture comprises of two productive instances of the salesforce.com platform (Core CRM and ICare), including equivalent multi-instance integrations with relevant backend systems (PRS, ICare-PF1, Core-WP1) and point solutions (Pardot, Dynasys, Gensuite, Qualtrics, QlikSense, etc.). Furthermore, the current CRM architecture is built on a heavily customized salesforce.com environment, featuring numerous bespoke interfaces and disparate technologies on both instances.

This architecture presents several challenges, including the following:

- Redundant processes exist in both ICare and Core CRM instances, with varying levels of maturity and user adoption.
- The highly customized and non-standard solutions are resulting in business-as-usual (BAU) challenges in Quotation, Contract, and Pricing management.
- Intricate integrations with two backend systems and custom interfaces are adding complexity.
- Non-CRM functions (Convergence) must be relocated to their corresponding standard solutions.
- Multiple instance management is impacting infrastructure, deployment, BAU support, and user management.
- Complex upgrade and release cycles require significant effort and specialized tools, adding to the overall complexity.

Recommendation

A greenfield implementation of the current CRM solution is recommended to address existing challenges, consolidating multiple instances into a single, unified platform.

This implementation will automate core CRM processes, standardize master data, unify pricing and quotation management, integrate complaint and quality inspection processes, and develop a standardized approach to sample management.

The new implementation will drive business growth and improve customer relationships by enabling real-time synchronization, eliminating custom logic, and reducing manual data entry.

Background & Context

Syensqo's current customer relationship management (CRM) processes are supported by a complex architecture that involves multiple applications, including two Salesforce instances, On-Premises and Cloud applications, and various manual and automated system interfaces. The various functions implemented, along with their current challenges, are detailed below.

[Core CRM interface provider.pdf](#)

[Core CRM interfaces consumer.pdf](#)

Account & Contact Management: The management of customer master data is characterized by diverse creation and onboarding processes for corporate groups and customers, which are dispersed across multiple teams, including the transformation centre, data operations teams, and service teams. These processes employ numerous hardcoded validations and custom interfaces that rely on manual intervention at every stage, lacking real-time synchronization, resulting in inefficiencies and potential data inconsistencies.

Product Management: The MDG system integration faces several challenges, including manual product creation risks, duplicate products, and data inconsistencies. The custom "External ID" field, required for interface key, is prone to errors if not populated correctly. Additionally, users from Special Chem and Novocare must notify administrators to update this field, and a report is needed to track missing IDs. These challenges necessitate careful management to ensure data accuracy and integrity.

Lead Management: A custom lead management system guides users through stages with mandatory fields and duplicate request detection. Leads are processed by Dataiku, assigning owners based on matched accounts, region, or rules. However, documentation requests bypass this logic, and delegations rely on daily batch jobs and assignment rules. The system faces challenges, including delayed GBU notifications, sales rep dependence, and potential errors in lead assignment and status updates.

Opportunity Management: The opportunity management system features several custom components, including a button to add products to an opportunity, a clone button to duplicate existing opportunities, a revenue forecast component to project revenue for the next 5 years based on expected volume, a postpone feature to delay delivery and close dates by 6 months, and a realised sales component to manually track invoiced amounts for shipped goods related to won opportunities.

Visit Report Management: A custom visit report feature generates a PDF summary of visit details, while a bespoke reporting functionality provides insights on customer data, sales, and orders. Custom buttons send reports internally or to customers using predefined templates, with automatic email distribution to team members and customers based on criteria like region and product family. The feature also allows managing visit report teams, linking contacts, and viewing related records like opportunities, quotes, and complaints.

Pricing: The pricing process is a complex, multi-platform system with varying GBU adoption. It integrates SAP ECC historical data and Dynasys forecasts into BW, generating Integrated Contribution Margin (ICM) insights, Customer Product Combination (CPC) price recommendations, and Contribution Margin improvements via Dataiku. This process utilizes custom objects for reviewing and committing, as well as custom interfaces for replicating prices to backend SAP.

Quotation Management: OneQuote is a custom application that manages the quotation process, including creation, product configuration, pricing, approvals, and customer communications. However, it has not been adopted by all Global Business Units (GBUs). Quotation validity dates and price validity dates differ; the latter has a longer horizon to minimize the impact of policy changes on customer orders. OneQuote data is not replicated to ECC, its price conditions are replicated, and open orders are adjusted manually during policy revisions. The Composites GBU uses the ECC Quotation process, which differs from OneQuote due to material group level differences. The outputs of OneQuote and ECC Quote vary significantly in detail and format across GBUs. For forecasting purposes, quotes from both systems are integrated with Dynasys, and quote reporting is done in Celonis (for Composites) and Cliksense (for TS and Novocare).

Contract Management: Contract management encompasses various contract types, including sales, distribution agreements and inter-business unit contracts. Contract data storage varies across business units, with key details including tracked validity periods for notification purposes, maintained product information for planning and sales forecasting in Cliksense, and excluded prices and discounts. The approval process is managed externally in ContractTech(Legal), with no output templates generated from CRM for customer sharing. Contract management is not integrated with backend systems or processes, CRM contracts serve only as a centralized repository for tracking and notifications, with contract volumes reported to Cliksense for forecasting and stored in CRM for reference and expiration reminders.

Complaint Management: Complaints, whether linked to sales orders or not, follow a guided process that includes registration, investigation, commercial response, customer communication, and closure. This process integrates with Gensuite for root cause analysis and resolution, as well as Qualtrics for customer feedback. However, quality inspections, returns handling, and credit memos are not linked back to the complaint. Custom functions facilitate acknowledgments and communications between internal and external teams, but improvements are needed to connect all related processes.

Sample Request Management: Sample management and tracking is a complex process that requires enhancement. Currently, some GBUs have an interface that integrates Salesforce, SAP, and CMC (a third-party sample provider) for automated sample transmission and information sharing. However, this interface needs to be replicated across all GBUs using CMC services for compliance purposes. The sample order process involves manual screening, which results in inefficiencies. Moreover, commercial samples management is entirely manual, relying on emails for inventory management, material records, and transactions, leading to significant communication challenges and time waste. A standardized approach is essential for capturing orders, communicating with production and R&I, and managing outbound logistics to end customers (both billable and non-billable).

Assumptions

Constraints

1. Gaining buy-in from stakeholders who may be attached to existing customizations and interfaces.

Impacts

1. Process streamlining will impact certain GBUs, requiring change management efforts to ensure a smooth transition.
2. Master Data cleansing and realignment required, with most information sourced from the leading system.
3. Reassess existing interfaces and only reinstate or reactivate necessary ones.
4. Ongoing projects - OneQuote rollout for Composites: scheduled for 2025
 - Pricing module updates: expected by October 2024, to display List Price/Recommended Price instead of two separate prices.

Business Rules

Options considered

Option A: Greenfield CRM implementation with single instance for all GBU's

Implement a unified, cloud-based CRM platform to streamline and standardize customer-facing processes across all Global Business Units (GBUs), replacing disparate systems and manual processes. The new platform will provide a single source of truth for customer data, automate workflows, and enable real-time synchronization across Account & Contact Management, Product Management, Lead Management, Opportunity Management, Visit Report Management, Transactional Pricing, Quote Management, OneQuote Management, Contract Management, Complaint Management, and Sample Request Management. This will improve data accuracy and integrity, reduce manual intervention, and enhance customer experience."

This option aims to:

- Replace disparate systems and manual processes with a unified CRM platform
- Provide a single source of truth for customer data
- Automate workflows and enable real-time synchronization
- Improve data accuracy and integrity
- Reduce manual intervention
- Enhance customer experience

By addressing the challenges mentioned, the greenfield CRM implementation aims to bring about significant improvements in customer-facing processes across all GBUs.

Option B: Maintain existing CRM solution in the current state, retaining Core CRM & ICare instances.

Continue to maintain and support the existing separate CRM instances, including the custom implementations, integrations, and interfaces currently in place.

This option allows us to preserve the existing investments in CRM technology and customizations, avoiding the need for significant changes or rework. It enables us to continue using the current systems and processes, while also allowing for future enhancements and optimizations within each instance.

Implications:

- Continued use of existing separate CRM instances and custom implementations.
- Potential for future enhancements and optimizations within each instance.
- Risk of maintaining complex and potentially inefficient processes across instances.
- Potential for data inconsistencies and integration challenges between instances.
- Ongoing support and maintenance costs for multiple instances.

Evaluation

	Option A - Greenfield CRM implementation with single instance for all GBU's.	Option B - Maintain Salesforce in its current state, retaining Core CRM and ICare
Alignment with "Simplification principle"	+ Systems, Processes and Integrations will be simplified and thereby reducing complexity, improve efficiency, and enhance the user experience, ultimately driving business success.	- By maintaining the current state, Syensqo is not embracing the simplification principle, which could lead to missed opportunities for efficiency gains, improved user experience, and better decision-making.
Alignment with "Standardization principle"	+ Standardization helps Syensqo by providing a unified platform for CRM and customer service, ensuring consistency across the organization, and enabling a single source of truth for customer data. This leads to efficient reporting and analytics, improved compliance with regulatory requirements, and reduced maintenance efforts. Standardization also enables scalability and flexibility, making it easier to adapt to changing business needs, and provides a consistent user experience, regardless of role or GBU.	- Retaining customizations and multiple instances means that standardization is not achieved, leading to inconsistent processes and data.
Maintenance Cost	+ A single CRM instance simplifies maintenance, reducing costs and minimizing the risk of integration and interface issues.	- Maintaining multiple CRM instances and customizations creates a complex environment that leads to duplicated efforts, resulting in costs increasing by 20-30%
Upgrade & Release management	+ Release and upgrade management is significantly simplified with a single CRM instance, offering a single upgrade path, faster testing and deployment, reduced risk of version conflicts, and simpler rollback procedures, resulting in lower costs and resource requirements.	- Multiple instances present complex release and upgrade management, with multiple upgrade paths to manage, slower testing and deployment, higher risk of version conflicts, and more complicated rollback procedures, ultimately leading to higher costs and resource requirements.
User Adoption and Experience	+ A single CRM instance offers a unified user interface and experience, promoting ease of use, and streamlined training, leading to higher user adoption rates and increased productivity.	- Multiple CRM instances provide tailored experiences for each business unit, boosting user satisfaction, but may lead to inconsistent user interfaces, increased training requirements, and lower overall adoption rates due to complexity and fragmentation.
Integration and Data Management	+ A single CRM instance simplifies integration and data management, providing a unified database, consistent data formatting, and reduced data duplication, resulting in improved data quality and integrity.	- Multiple instances introduce complexity, with disparate databases, inconsistent data formatting, and increased risk of data duplication and inconsistencies, compromising data quality and integrity, and making integration with other systems and applications more challenging.

Reporting and Analytics	<p>+ A single CRM instance enables unified reporting and analytics, providing a comprehensive view of the organization with consistent metrics and KPIs, simplified data analysis, and improved insights across Lead to Cash processes.</p>	<p>- Multiple instances lead to fragmented reporting in CRM and QlikSense, inconsistent metrics, complex data analysis, and limited insights, ultimately increasing reporting complexity and hindering informed decision-making.</p>
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See also

File	Modified
Microsoft Excel Spreadsheet IAC 01.01 Costing Model_366 days.xlsx	Nov 25, 2021 by Alves, Sofia
Microsoft Excel Spreadsheet IAC 01.01 Costing Model.xlsx	Nov 25, 2021 by Alves, Sofia

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Change log

Version	Published	Changed By	Comment
CURRENT (v. 24)	Oct 07, 2025 09:38	NUTBUTSABA, Phathorn	
v. 23	Oct 07, 2025 09:35	NUTBUTSABA, Phathorn	
v. 22	Oct 07, 2025 09:32	NUTBUTSABA, Phathorn	
v. 21	Mar 31, 2025 10:58	Gomes, Susana	
v. 20	Mar 31, 2025 10:29	Gomes, Susana	
v. 19	Aug 14, 2024 15:41	Gomes, Susana	
v. 18	Aug 13, 2024 18:11	Gomes, Susana	
v. 17	Oct 17, 2022 17:36	Lara Alves	
v. 16	Oct 12, 2022 16:52	Lara Alves	
v. 15	Oct 12, 2022 16:52	Lara Alves	

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Workflow history

Title	Last Updated By	Updated	Status
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