

# Business Structures management in BFC SYENSQO

Status	
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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, PF1, WP1) and point solutions (Eg., Dynasys, Gensuite, Qualtrics, QlikSense, etc.). Furthermore, the current CRM architecture is built on a customized salesforce.com environment, featuring numerous bespoke and tightly coupled interfaces, primary reliant on WebMethods technology on both instances.

This architecture presents several challenges, including the following:

- Adapted processes exist in both ICare and Core CRM instances, with varying levels of maturity and user adoption.
- The customized solutions require ongoing management particularly in the areas of Quotation, Contract, and Pricing management.
- Intricate integrations with two backend systems and custom interfaces are adding complexity.
- Complex upgrade and release cycles due to customizations require significant effort and specialized tools, adding to the overall complexity.
- Current bespoke developments hinder efforts towards aligning with a Simple and Standard approach.

## Recommendation

A greenfield implementation of a CRM solution is recommended to address the existing challenges, consolidating multiple instances into a single, unified platform with a focus on the out of the box functionality.

This implementation will simplify key 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 should improve customer relationships by enabling real-time synchronization, eliminating custom logic, reducing manual data entry and support imperative processes as well as reducing the total cost of ownership of the platform and landscape.

## Background & Context

Syensqo's current customer relationship management (CRM) processes are supported by a complex architecture that involves multiple applications, including two Salesforce instances, integration to both On-Premise and Cloud applications, and various manual and automated system interfaces.

The scope of the functions implemented in the existing CRM landscape are detailed below.

See below two links for existing landscape:

[Core CRM interface provider.pdf](#)

[Core CRM interfaces consumer.pdf](#)

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

**Product Management:** An integration exists between CRM system and ERP to support the synchronization of product master information. The existing integration design relies on some user-based business rules to work seamlessly but can cause inconsistencies. For example, creation of new products, duplication of products and overwriting of records. The custom "External ID" field, required for integration, is prone to errors if not populated correctly. Additionally, users from Special Chemicals 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:** Some custom developments have been created on top of the lead management functionality to guide users through the lead lifecycle stages with mandatory fields and duplicate request detection functionality. 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. Some of the challenges with this solution include delayed GBU notifications, sales rep dependence, and potential errors in lead assignment and status updates.

**Opportunity Management:** The opportunity management system features several custom developed 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 prices, 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 QlikSense (for TS and Novocare). An existing business project exists to migrate composite business unit into the OneQuote solution.

**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 QlikSense, and excludes 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 QlikSense 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 wasted. 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

- The choice of technology for the new CRM platform will be addressed in a later phase.
- SAP S/4HANA will serve as the ERP (Enterprise Resource Planning) application for managing and executing customer records, sales contracts, sales orders, logistics, warehousing, transportation, billing, and rebates. To ensure seamless business process execution and master data integrity, the recommended solution must integrate with S/4HANA.
- Orders generated from the Additive Manufacturing webshop and Small Customer Webshop account for only 4% of total orders for 2023. However, we understand that there are ongoing discussions to put the AM webshop on hold by end of 2024, and therefore, a comprehensive analysis has not been conducted on these two webshops.
- The technical benefits of One Platform stem from its greenfield approach. However, if integration occurs with existing systems, no benefits are anticipated.

## Constraints

1. Gaining buy-in from stakeholders who may be attached to existing customizations and interfaces.
2. Securing proper sponsorship and executive support to drive transformational change, ensure resource allocation, and champion the initiative across the organization.

## 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

No business rules identified in this phase to implement the recommended solution. Further assessments will be done in detailed design phase.

## 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 and automate workflows to enable real-time synchronization.
- Enhance the lead management process with real-time synchronization and automated lead assignment.
- Implement a standardized pricing and quotation management process, integrating with ERP and Kinaxis.
- Develop a comprehensive contract management system, integrating with backend systems.
- Streamline the complaint management process, linking quality inspections, returns handling, and credit memos.
- Implement a standardized sample request management process and automating sample order processing.
- GBUs are represented at the highest organizational level, enabling seamless M&A with minimal disruption; this allows for easy carve-outs or mergers without compromising the existing configuration.
- Provide the building blocks for expanding the usage of CRM into areas not used currently to better support our customers.

Some challenges that might need to be mitigated include:

- Re-negotiating custom-developed functions with business stakeholders can be time-consuming.
- User adoption and training will also depend on the tool identified for the greenfield implementation.
- Existing data quality issues need to be addressed.

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

## **Option B: Refine and streamline existing processes and integrations, retaining current CRM instances.**

Under this option, the two Salesforce instances will be retained. A comprehensive evaluation and assessment of existing processes and integrations is necessary to identify opportunities for optimization. Additionally, custom-developed functions will be re-evaluated in collaboration with business stakeholders to secure their agreement on adopting standard, out-of-the-box approaches and functions, replacing bespoke solutions where feasible.

Challenges:

- Streamlining processes and integrations across multiple CRM instances can be intricate.
- Ensuring data consistency and integrity across instances can be difficult.
- Renegotiating custom-developed functions with business stakeholders can be time-consuming.
- User adoption and training may be required.
- Existing data quality issues may need to be addressed.
- High efforts to re-engineer existing solutions.
- Current CRM instances may have limitations that hinder streamlining efforts.

Addressing these challenges is crucial to successfully refining and streamlining existing processes and integrations while retaining current CRM instances.

## **Option C: Maintain existing CRM solution in the current state, retaining current CRM 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.
- Potential clash with simple and standard ERP Rebuild principles.

## **Evaluation**

	<b>Option A - Greenfield CRM implementation with single instance for all GBU's</b>	<b>Option B - Refine and streamline existing processes and integrations, retaining current CRM instances</b>	<b>Option C - Maintain Salesforce in its current state, retaining current CRM instances</b>
Alignment with "Simplification principle"	<b>+</b> Systems, Processes and Integrations will be simplified and thereby reducing complexity, improve efficiency, and enhance the user experience, ultimately driving business success.	<b>-</b> Although streamlining processes and interfaces will bring some improvements, maintaining two separate CRM instances means Syensqo is not fully embracing the simplification principle.	<b>-</b> 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 "Standardisation principle"	<b>+</b> 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.	<b>-</b> Maintaining two separate CRM instances restricts Syensqo from achieving true standardization, resulting in a lack of unified platform for CRM and customer service, inconsistency across the organization, and no single source of truth for customer data, ultimately hindering efficiency and effectiveness.	<b>-</b> Retaining customizations and multiple instances means that standardization is not achieved, leading to inconsistent processes and data.
Maintenance Cost	<b>+</b> A single CRM instance simplifies maintenance, reducing costs and minimizing the risk of integration and interface issues.	<b>-</b> Maintenance costs will be higher than they would be with a single, unified CRM instance, due to the added complexity and duplicated efforts required to maintain multiple instances	<b>-</b> 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	<b>+</b> 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.	<b>-</b> Multiple instances still presents challenges for release and upgrade management, including longer testing cycles and a higher risk of version conflicts, which may require more resources and budget to navigate.	<b>-</b> 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	<b>-</b> Significant change management effort as part of moving to a new simple and standardized CRM implementation.	<b>+</b> While maintaining multiple instances requires careful management, it offers a tailored experience for each business unit.	<b>+</b> Multiple CRM instances provide tailored experiences for each business unit, boosting user satisfaction and require little to no significant change management.
Integration and Data Management	<b>+</b> 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.	<b>-</b> Although processes are being streamlined, it's essential to reassess existing interfaces to determine if they can be eliminated or optimized. If not, the benefits of integration and data management with multiple instances will be limited.	<b>-</b> 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	<b>+</b> 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.	<b>+</b> Refining and streamlining existing processes and integrations will lead to improved reporting and analytics capabilities, without requiring significant changes to the existing CRM infrastructure.	<b>-</b> 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.
Collaboration	<b>+</b> One single instance will enable day-to-day collaboration across GBUs on key accounts (transversal). SpP and Composite Materials share customers with GBUs currently on Core CRM.	<b>-</b> Having two instances would lead to data fragmentation, hindering day-to-day collaboration across GBUs on key transversal accounts, and causing inefficiencies in managing shared customers between SpP, Composite Materials, and GBUs currently using Core CRM.	<b>-</b> Having two instances would lead to data fragmentation, hindering day-to-day collaboration across GBUs on key transversal accounts, and causing inefficiencies in managing shared customers between SpP, Composite Materials, and GBUs currently using Core CRM.

See also

List of **120** currently active interfaces [CRM Integrations List - File to Use - Google Sheets](#)

List of Functional Specifications for current **custom and bespoke** enhancements

Current Functional Design Documents	Links
Account and Contact Management	<a href="#">FD - P1. Account &amp; Contact management - SBS IS - Customer Support - Syensqo - Wiki knowledge base</a>
Product Management	<a href="#">FD - P20. Products Management - SBS IS - Customer Support - Syensqo - Wiki knowledge base</a>
Lead Management	<a href="#">FD - P22. Lead Management - SBS IS - Customer Support - Syensqo - Wiki knowledge base</a>
Opportunity Management	<a href="#">FD - P3. Opportunity Management - SBS IS - Customer Support - Syensqo - Wiki knowledge base</a>
Visit Report Management	<a href="#">FD - P18. Visit Report Management - SBS IS - Customer Support - Syensqo - Wiki knowledge base</a>
Pricing	<a href="#">Pricing PROGRAM - Pricing Front End - 11240 - Syensqo - Wiki knowledge base</a>
Quotation Management	<a href="#">ONE Quote - CORE - Business Process - Pricing Front End - 11240 - Syensqo - Wiki knowledge base</a>
Contract Management	<a href="#">PCO - Contract Management - Pricing Front End - 11240 - Syensqo - Wiki knowledge base</a>
Complaint Management	<a href="#">FD - P6. Complaint Management - SBS IS - Customer Support - Syensqo - Wiki knowledge base</a>
Sample Request Management	<a href="#">FD - P7. Sample Request Management - SBS IS - Customer Support - Syensqo - Wiki knowledge base</a>

## Change log

Version	Published	Changed By	Comment
<b>CURRENT (v. 56)</b>	<b>Mar 25, 2025 17:33</b>	<b>STOISSICH, Caroline</b>	
v. 55	Jan 08, 2025 17:01	STOISSICH, Caroline	
v. 54	Jul 30, 2024 15:19	STOISSICH, Caroline	
v. 53	Jan 04, 2024 11:25	STOISSICH, Caroline	
v. 52	Jan 04, 2024 10:04	STOISSICH, Caroline	
v. 51	Jun 01, 2023 11:30	STOISSICH, Caroline	
v. 50	Jan 24, 2023 17:42	STOISSICH, Caroline	
v. 49	Jan 24, 2023 17:40	STOISSICH, Caroline	
v. 48	Jan 24, 2023 16:09	Célia Guerra	
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[Go to Page History](#)

## Workflow history

Title	Last Updated By	Updated	Status
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There are no pages at the moment.