Justin Litz
Global Vice President, Enterprise Account Data Management

- Overall responsibility for the SAP Global Enterprise Account Data Management practice which includes data strategy, process, and data governance.
- +15 years of experience helping businesses grow their information management and data governance competency.
- Helped build and defined the first data warehouse at Home Depot Supply
- Implemented a corporate data cleansing and management practice supporting a new ERP deployment for a $+1 Billion distributor
- Business lead to evolve the Data Management practice within SAP
- Extensive experience in implementing enterprise Sales and Marketing solutions both in data management and business intelligence.
Enabling Sales Growth through Quality Data

It is not easy for me to locate and use the RIGHT Account and Contact. It takes me too long to do simple administrative tasks such as Contact creation. I have to go to multiple sources outside of to gain critical insights on my accounts. There appears to be inconsistent replication, so I am not sure that I have confidence the Account Owner is missing or regularly incorrect.

Make it easier to locate the right Account and Contact quickly via improvements to searching.

Keep time spent on administrative tasks to a minimum - Easy Account and Contact Creation.

Give the Account Executive the ability to build and manage pipeline.

Real Time, Cloud based customer and industry insights.

Let the Account Executive focus on SELLING.
Understand Key Business Goals & Objectives
Build Customer data management capabilities to support significant contribution to:

<table>
<thead>
<tr>
<th>Increase Top-line Revenue</th>
<th>Increase Operational Efficiencies</th>
<th>Reduce Risk Exposure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grow profits via net new or existing customer base</td>
<td>Reduced process cycle times, enabling reduced costs</td>
<td>Tax liability, by adherence to compliance</td>
</tr>
</tbody>
</table>
Understand Key Business Goals & Objectives
Identify and understand associated Key Business process

Properly formed master data enables business process

Master Data Create, Update and Delete (CRUD) Processes

Automation and Tools
Common Global Data Governance Standards, Best Practices, and Business Rules
Align with Key Business Executives, Process Stakeholders, and IT

Know your stakeholders

Management

Provide oversight support, resources, resolve issues

Business Process Owners

Business process & operations all play a role in information governance

IT

Provides data technology roadmap, data architecture, models & technical standards
Builds & Runs trusted data stores
Align with Key Business Executive & Corporate Initiatives
Information Governance Evolution

- **Phase 1**: CDM launch and pilot
- **Phase 2**: Operationalizing CDM
- **Phase 3**: Expansion
- **Phase 4**: Process integration
- **Phase 4**: Automation and adoption

**Executive sponsor:**
- Corporate COO
- Head of sales
- Chief process officer and chief information officer

**Clear vision**
- Corporate COO

**Operational excellence**
- Corporate COO and chief processing officer

- **Run simple**

- **2009**
- **2010**
- **2011**
- **2012**
- **2013**
Enable a Value Added Governance Model
driven by Business Impact Analysis

Step 1: How are Governance topics identified?

Business Challenge
How to deploy data governance and creates the most value with minimum cost...

Defect based Data Object & Fields
Business Partner (~150 fields)
Name
IMS /EMS SIC code
Revenue
SO/SG
....
....

Analysis

Increase / Decrease Revenue
Increase / Reduce Cost
(operational inefficiencies)
Regulatory Compliance

Step 2: Why are we governing? (determine value to the business)
Step 2A: Apply business criteria to the importance of data field

Business Critical
Drive Business Process (~10-20%)

Business Relevant
informational only (~60-80%)

Not Used (remove from data model) (~10-20%)

Step 2B: Segment Data Fields

Step 3: How do we govern?

Step 4: Where do we Govern

Active/Reactive**
Global
Regional
Local

Step 5: Define Data Policy

Focus Phase 1

Policies and Guidelines
• Who owns the data
• Who owns the policy
• How will the quality be monitored
• Roles
• Data Architecture
• Data Security
• Lifecycle Mgmt
• Data Quality Mgmt

** - Ability to actively monitor requires a full capability (people, process, tools)
## Enable a Value Added Governance Model

### Types of governance roles required

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibilities</th>
</tr>
</thead>
</table>
| **Business Data Lead**        | - Reports to Line of Business COO (except Customer Master Data)  
                                - Works with the COO of the line of business, to ensure future strategies are translated and delivered as data focused projects and programs  
                                - Ensure business process and data teams are in alignment |
| **Process Owner**             | - Reports to Line of Business Process Exec  
                                - Field Operations  
                                - Accountable for the relevant business process.  
                                - In Data terms this means the completeness and accuracy.  
                                - Will partner with the Business Data Lead and supervise the delivery of Data Manager/s  
                                - Responsible for ensuring that the Business Process is properly and thoroughly understood, documented, meets the business objectives and is followed |
| **Data Manager**              | - Regional Data Management Lead  
                                - Responsible for ensuring that the Business Process is properly supported related to data activities  
                                - sets and tracks relevant KPIs (which could be on data completion, or process tracking)  
                                - alerts the Process Owner and/or Data Support on issues or changes needed to meet business changes or local needs |
| **Data Support**              | - System Key Users  
                                - Data Quality Managers  
                                - Data Services Bureau  
                                - These are the supporting & execution functions.  
                                - Typical process enablers such as a data service team or IT who provide automated data tools |
Define a Data Strategy
Align to business goals and resolves key data pain points

- Identify and Consolidate Top Business Goals and Data Pain Points
- Identify and ensure coverage across the various data types
- Consolidate input from the business, group into common themes and aligned to data strategy
- Identify key projects and roadmap
Execution of Data Strategy
includes a Business Agreed upon roadmap

1. **YEAR 1**
   - Data Quality Reporting Tool & Training
   - Data Quality Program
   - Mass Change and Update Tool with IT
   - Business User / Inside Sales Data Management
   - Global License Audit
   - Maintenance Renewal Contact
   - Simplify data supported business process (Inside Sales)
   - Support Product and Employee data quality
   - Product / Solution hierarchies
   - Forecasting data improvement
   - Install base Account Support

2. **YEAR 2**
   - Central BP Creation and Maintenance with IT
   - Improve Customer Satisfaction DQ
   - 3rd Party data Improvement with GMO
   - Implement Workflow and Automation
   - Enhance Territory Management Tool Support
   - Opportunity & Activity Data Management
   - Contact data support
   - Data Synch between ISP/ICP/PRM

3. **YEAR 3**
   - Mobile Data Management
   - Automated Workflow
   - Implement Central Business Partner
   - Customer Data Self Service

4. **YEAR 4**

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Establish capabilities
To monitor and analyze the data

Executive Dashboards
- High level analytics, mobile access

Analytics
- Slice and dice filters.
- Perform medium level summary & trending analysis

Detail Reports
- Detail analysis and drill down.
- Ability to build custom reports for advanced users
Establish capabilities
To centrally govern and manage account assets and distribute the data

Enterprise Cloud Account DM Required Capabilities
1. Integration
2. Data Governance
3. Workflow
4. Business Rules
5. Data Integration, Sourcing and Scalability
6. Match & Merge
7. Flexible Logical Data Model
8. Hierarchy Management
9. Reporting and Analytics
10. Global Data
11. Meta Data Management
12. Domain Explorer

Established capabilities are essential for central governance and management of account assets and distribution of data.
Solution Improvements:
Locating the Most Relevant selling Account

Leverage new “My Active Sell To Accounts” Filter to Show “Most Sales Relevant” Accounts to Account Executive by Default

- As an Account Executive
  Previously available filter would return 240 Accounts when searching solely using “My Accounts”
  When using new My Active Sell To filter, only 9 most relevant results will appear by default.

EXAMPLE 1
- Hi-Tech
  Multi-national prominent hardware & software company

EXAMPLE 2
- Hi-Tech
  Worldwide leader in Services and Software

- As an account executive
  Previously available filter would return 145 Accounts when searching solely using “My Accounts”
  When using new My Active Sell To filter, only 20 most relevant results will appear by default.

In general a 72% improvement in search results, meaning on average only the most sales relevant 18% of Accounts will display by default to the Account Executive.

20 SECONDS
minimum to locate correct Account

2 SECONDS
90%
decrease
Solution Improvements:
Help Build Pipeline: Timely and Proactive Notification Pushed to Account Executive

Focus of Enhancement: Global Account Owners and Local Account Owners need to know the latest on Opportunities within their Accounts.

Timely communication of latest Opportunity status updates pushed when Opportunity status changes.

Dear [GAO Name]:

This is a notification to inform you that a new Opportunity [has been created/has been lost/has been won] within a subsidiary of [Account Name], of which you are Account Owner.

SAP View Top Parent: [Name]
Subsidiary Account: [Name]
[Link to Subsidiary Account in C4C]
[Link to Subsidiary Account in On Prem]
Opportunity Owner: [Name]
Opportunity Name: [Name] [ID]
[Link to Opportunity in C4C]
[Link to Opportunity in On Premise]
Account Executive: [Name]

Note: The above links will not work when you are not connected to the SAP Network.

This email is generated automatically by the system. Please do not reply.
Solution Improvements:
Provide Customer and Industry Insights – all in one place

Focus of Enhancement: Sales representative productivity and customer intelligence

Before:
• Account Executives spend too much time hunting for the industry research and customer insights that exist outside the SAP firewall
• Ex: Google searches for company finances and news, company website, personal contacts, individual subscriptions to data sources

New:
• Real Time Company new is embedded in our Cloud for Customer
• Provides instant access to information on 100 million global companies, access to contact persons at those organizations, and hundreds of comprehensive industry reports
• Including opt-in “push” notifications for news alerts, press releases, and key customer insights
**Solution Improvements:**
Customer and Industry Insights – all in one place

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**Results:**

- **2,000** active users on solution
- **86%** of users surveyed say our internal solutions help them perform better
- **80%** of those users say they recover at least 1 hour in productivity per week

**Case Study:** Sales rep pro-active news notification

“I recently started using the alerts and got a notification that a sporting company bought my account. I reached out as they are looking for an ERP solution, I was able to position a cloud solution to reduce their equipment and IT staff. We have been placed on the short list and plan to win this by June. **When we win this, it will be a total value contract.**”

*ISE Midwest Region*
## Solution Improvements:
Extending sales and marketing solutions to our cloud based business

<table>
<thead>
<tr>
<th>Focus Area</th>
<th>Master Data Management</th>
<th>Marketing Automation</th>
<th>Marketing Intelligence</th>
<th>Sales Planning</th>
<th>Sales Intelligence</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Benefit</strong></td>
<td>Informed, unified view of customers, prospects and partner</td>
<td>Seamless integration with marketing programs</td>
<td>Insights to attract, retain, and cultivate the most valuable customers</td>
<td>Optimize Go to Market Activities and sales teams to drive growth</td>
<td>Decision-ready insights when, where, and how you need them</td>
</tr>
<tr>
<td><strong>Capabilities</strong></td>
<td>Single View of Customer</td>
<td>Demand Generation</td>
<td>Company Intelligence</td>
<td>Global Account Planning</td>
<td>People &amp; Executive Data</td>
</tr>
<tr>
<td></td>
<td>Data Standardization</td>
<td>Digital Marketing</td>
<td>Marketing Analytics</td>
<td>Territory Planning</td>
<td>Customer Intelligent News</td>
</tr>
<tr>
<td></td>
<td>Data Cleansing</td>
<td>Lead Scoring</td>
<td>White Space Analysis</td>
<td>Call Prep Sheet</td>
<td>Alerts</td>
</tr>
<tr>
<td></td>
<td>Data Governance</td>
<td>Web Forms</td>
<td>Green Space Analysis</td>
<td>Compensation</td>
<td>Industry Profiles</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Web Forms Optimization</td>
<td>Competitive Analysis</td>
<td>White Space</td>
<td>Propensity to Buy</td>
</tr>
<tr>
<td></td>
<td></td>
<td>IP Mapping</td>
<td>Share of Wallet Analysis</td>
<td>Propensity &amp; retention models</td>
<td>Install Technology</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Contacts</td>
<td></td>
<td>Who, When, Why to Call</td>
<td></td>
</tr>
</tbody>
</table>
Measure Adoption & Value to the business

- Pulse Check Survey
- Continuous improvement via feedback from weekly Lunch ‘n Learn sessions
- Solicitation of user Case Studies and Success Stories

“[The solutions are] very helpful and the new features look great.” – AE, US South

“It’s amazing stuff that you guys are doing...thanks for your support.”

– NA Field Marketing
**Measuring adoption & value to the business**
Define KPI’s and business benefits

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**Increase in Sales Team Productivity**

**Target:** 2,500,000 €

*Type:* Productivity increase  
*Description:* Productivity increase of sales reps due to increased sales intelligence and research for Accounts, including alerts and leadership info  
*KPI:* Active Users, Time Savings

**Target:** 1 hour saved per week for ‘n’ sales users @ 52 weeks  
@ x€/hour* productivity gain

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**How to prove?**

**What users do**

**What users say**

"It's amazing stuff that you guys are doing... thanks for your support."  
– NA Field Marketing

<table>
<thead>
<tr>
<th>Response</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>I do not use the solution</td>
<td>47</td>
</tr>
<tr>
<td>At least once every 2 weeks</td>
<td>28</td>
</tr>
<tr>
<td>At least weekly</td>
<td>29</td>
</tr>
<tr>
<td>At least daily</td>
<td>19</td>
</tr>
<tr>
<td>Multiple times each day</td>
<td>22</td>
</tr>
<tr>
<td><strong>Total Responses</strong></td>
<td><strong>145</strong></td>
</tr>
</tbody>
</table>

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Measuring adoption & value to the business
Knowing what your customer are saying and are you improving

“The quality of data in CRM has improved probably thanks to the support of Sales Operations.”

“The quality of our basic account data is quite horrible. You try to clean data but the process of updating records is so cumbersome.”

“The quality of data in CRM has improved probably thanks to the support of Sales Operations.”

“It seems as if there has been a massive clean up of data but there are still some issues with data.”

“Having the solution integrated into CRM speeds up my daily processes”

“This solution is a step in the right direction.. it allows sales to be armed with more insight about the companies they are tasked with selling into...keep up the good work and keep advancing!”

What are people saying

Then / 2010

“Fast, rich information”

Now / 2014

93% of the respondents say that Usability improvements in CRM functionality would be useful to improve data quality, with the average score 4.2 (2010)

79% of the respondents say that more dedicated personnel to assist sales with account and contact data entry would be useful to improve data quality, with the average score 3.6. (2010)

“Automated messages after setup, easy searching, easy financial overview of companies”
Enabling Sales Growth through Quality Data via 10 Focused steps

1. Identify business pain points
2. Understand the Business goals and objectives
3. Know the business processes that can drive the required change
4. Align with Key Business Executives and Business Process Owners
5. Enable a value added Data Governance Model
6. Define and Execute a business defined Data Strategy
7. Establish capabilities and tools to monitor and manage data quality
8. Enable targeted business solutions
9. Extend solutions
10. Measure adoption & value to the business
Questions