

Better Together: how a BPM and CRM integration can leverage your business

ProcessClick – Your Agile BPM for Salesforce

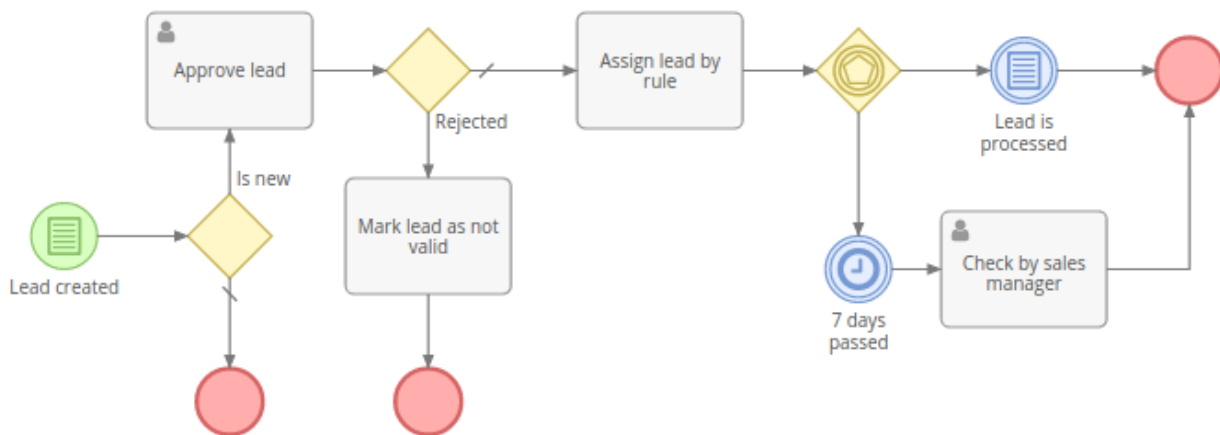


PROCESSCLICK - ARTICLE

American engineer, professor, and management consultant W. E. Deming once said:

"If you can't describe what you are doing as a process, you don't know what you're doing".

[Everything is a process: from your everyday life to your business](#), you can always describe everything that happens as a result of evolving statuses that follows a certain logic.



Business processes are the core element of your company and a process-driven approach to business can help in several ways: for example, automating routine operations can save time and energy spent or supporting actions and operations with actionable data can improve a lot your workers' job.

This particular business methodology goes under the **acronym "BPM" (Business Process Management)**: a discipline that involves "[...] any combination of modeling, automation, execution, control, measurement and optimization of business activity flows, in support of enterprise goals, spanning systems, employees, customers and partners within and beyond the enterprise boundaries", according to **The Workflow Management Coalition definition**.

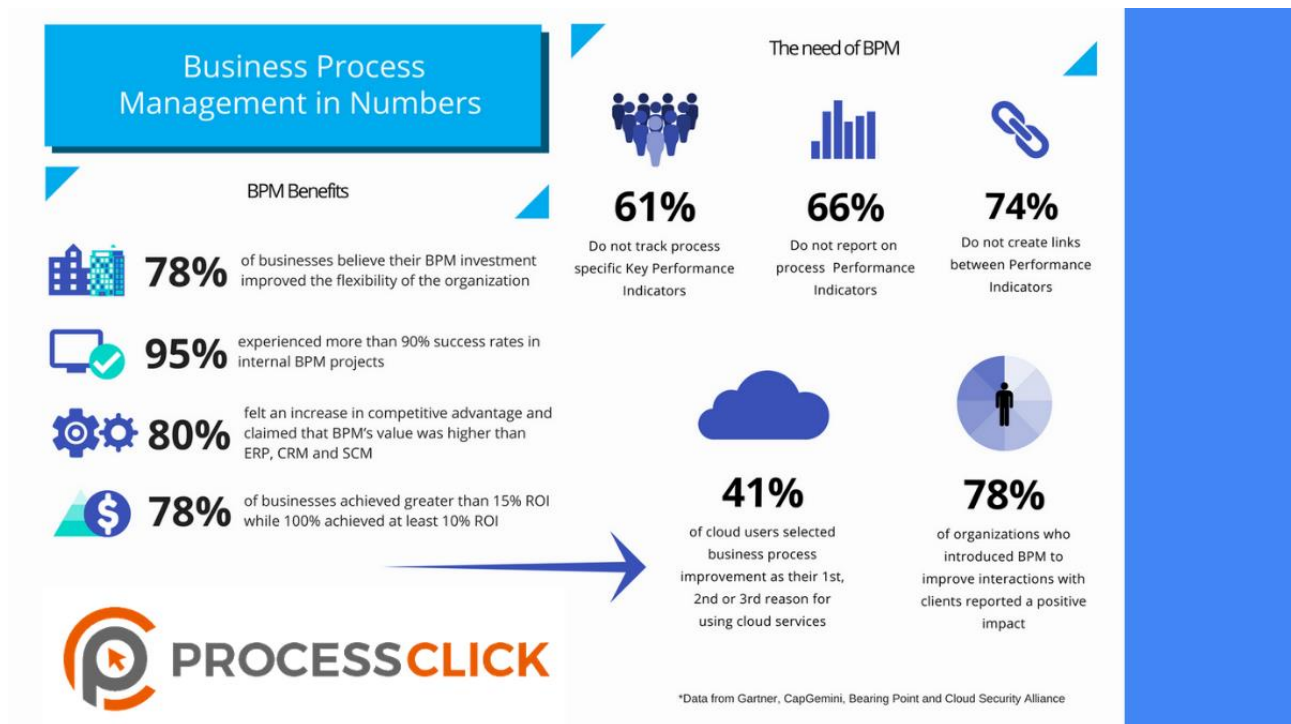
THE PROBLEM

Now, the modern business climate is getting more competitive day by day and it's pretty difficult to monitor and control properly business processes, you may end up with heavy flows that seek to manage too many activities or with processes so complex that are uncontrollable. Furthermore, the risk is to optimize processes quality for the needs of others and not for the needs of those doing or receiving the work: BPM platform vendors have actively encouraged a world where the "systems", not people, are issuing orders according to the company business logic.

You can just imagine how much fun that is for your employees or even more brutal, for your business, trying to put that approach on your customers. Today, for these reasons, BPM is not as



much spoken about in enterprise circles: some even claim that the BPM game is over, BPM is dead, due to its view focused only on the “inside” of a business organization.



As a response to nowadays increasing global market competition, in the last decade, some companies in various industries tend to focus on another approach: manage customer relationships to increase business performance. **Towards the end of the 1990s and in the early 2000s, many Customer Relation Management (CRM) systems were rolled out with an extensive focus on the customer view and customer experience.** Salesforce, by delivering CRM in the cloud, has grown to become the de facto standard for managing every type of customers' data: organizations of all sizes now store critical and confidential business data inside it. That is great but, still, CRM alone isn't able to give us the 360° vision of your business, focusing only on the “outside” of a business organization.

It seems there's a gap to fill here: we have two very powerful tools that however they don't collaborate; BPM has been always seen as a separate tool from CRM and vice-versa. That's a pity. The point now is: why not face this situation, getting the best from both of them? Shall we try to bring together IT and Business, creating value for your company?

THE SOLUTION

The solution is under our eyes. In fact, it's possible now to take advantage of this combination through the application ecosystem that Salesforce has created, letting your business unleash the combined power of data and process management. **A BPM and CRM integration can give you the ability to manage complex business processes with ease, leverage all the data that you have, better understand the status of your business, discover and fix bottlenecks and discrepancies, improves company performance continuously.** Within the Salesforce platform, a BPM app can easily be deployed and used, with a no-code configuration and fast implementation.

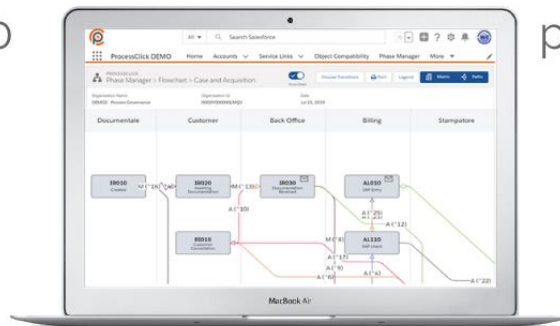


Entirely built on Salesforce, ProcessClick acts as a BPM and addresses the need to design and maintain complex business processes, improving the governance, and enforcing the design directly at execution time. ProcessClick is an accelerator that reduces the gap between solution/architect design and developments, achieving efficiency in the realization of software applications, replacing common operations and repetitive coding tasks with a structured and maintainable approach, with an easier configuration of Process operations, to deliver a higher degree of control over architecture quality and consistency, with agility in case of changes on processes.



Your Agile BPM for Salesforce®

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The results are incredible: in one move you can avoid data silos, discard monolith applications, prevent system redundancies, and so on. It's not just about automated some repetitive processes or tasks: it's having your business under control, ready to handle any change that could happen, develop a constant improvement in your business efficiency.

BPM and CRM, since they are powerful and useful management tools until today have been two separate worlds: **now, we're able to make them integrate and collaborate, for the best of your users, your customers, and your business.** With this great combination, your business can really take off. [Check out ProcessClick on AppExchange!](#)

CONTACTS

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