



CRM Glossary Guide



AA – *Automated Attendant* is a device connected to voice mail systems that answers and may route incoming calls or inquiries.

ABANDON RATE – *Abandon Rate* refers to the percentage of phone calls disconnected before being answered in a call center queue.

ACD – *Automatic Call Distribution*. ACD routes calls based on user/agent roles and skills, location, channel or other automation issues.

ASP – *Application Service Provider*. A host service provider allowing you to outsource your database and applications servers as well as their service and maintenance.

BACK-OFFICE – Business applications, which relate to the day-to-day transactions of a business such as accounting, logistics, human resources.

BROWSER – A software program used to query, search and view information on computer sites connected to the Internet.

CALL CENTER – A dedicated pool of in and/or outbound telephone personnel. Call Centers have traditionally referred to internal or external customer support centers, however, today include functions such as telemarketing, order fulfillment, claims processing as well as customer support and service.

CASE – A *Case* is a unique incident reporting product or service issues and tracked in a CRM support queue.

CATI – *Customer Assisted Telephony Integration*. The ability to join and guide on-line visitors via telephone.

CCO – *Chief Customer Officer* is a new role in the ranks of CXO. If you don't have one start thinking about your business.

CLIENT/SERVER – Refers to a traditional application platform. Applications, which run on a client/server platform, require a portion of the application to be installed and shared on both a database or application server and the client (desktop computer). Client/Server technology is still very prevalent today but yielding to Web based applications. In this case, no client version of software is needed to access or run the application, only an Internet connection, hence Web based.

CONTACT CENTERS – Traditional call centers handle voice-only customer contact, whereas contact centers include all types of channels of customer contact, including voice (e.g., telephone, IVR, speech recognition and voice verification), the Internet (e.g., e-mail, the Web, fax, video kiosks and mail). This is an inbound and outbound service-based environment in which agents handle all types of contacts regarding sales, customer service, marketing, telemarketing, collections and other functions. A contact center is logically consolidated, but can have a physically decentralized environment.



CRM (Software) – *Customer Relationship Management* is a set of methodologies, software and usually Internet capabilities that help an enterprise manage customer relationships in an organized way. It includes all business processes in sales, marketing and service that touch the customer. For example, an enterprise might build a database about its customers that describes relationships in sufficient detail so that management, salespeople, people providing service, and even the customer can access information, match customer needs with product plans and offerings, remind customers of service requirements, know what other products a customer has purchased, and so on. In contrast to customer care, Customer Relationship Management tends to be used to deal more specifically with the integration of all business functions with each other.

CSS – Once known as the complaint-handling department, CSS is responsible for retaining and extending customer relationships once a product or service is sold. Customer service interacts with customers, on a reactive or proactive basis, more frequently than any other organization and is critical for maintaining customer satisfaction. Due to the increasing complexity of customer interactions, customer service organizations need a complex technological infrastructure that is flexible, extendible, scalable and integrated to meet customer needs on a timely and accurate basis.

CTI – *Computer Telephony Integration* is intelligent networking of customer and telephone systems to allow desktop computers and telephone switches to automate functions and data flow.

CUSTOMER INTERACTION POINTS – The interaction channels between the company and its customers where customer value and behavior can be affected.

DATABASE – A database is an intelligent repository for the processing and data entry that your users produce.

DATA MINING – This functionality involves the process of discovering meaningful correlations, patterns and trends by sifting through large amounts of data stored in repositories. Data mining employs pattern recognition technologies, as well as statistical and mathematical techniques.

DATA WAREHOUSING – Data Warehousing is intelligent storage of data generally “off-line,” however readily available to feed data mining and analysis.

CRM – Automated CRM functions driven by defined data parameters, events or conditions. All CRM is moving toward providing this very important capability.

ERP – *Enterprise Resource Planning*. A term originally coined by Gartner Group to describe the management systems covering manufacturing and resource/capacity planning. ERP has expanded to refer to a host of financial, distribution, human resource as well as manufacturing and material planning applications. ERP generally refers to one system or a cluster of systems covering all of the above. The functions of CRM are generally to be considered as an inclusive part of ERP.



FAQ – *Frequently Asked Questions*. Often within the support section of a Web site where users can browse common questions and see a selection of answers.

GUI – *Graphical User Interface* refers to the display of software on a screen using graphics, symbols and icons rather than text alone. An example of a GUI is Microsoft's "windows" format.

HELP DESK – Telephone or Web based assistance for external or internal support.

HTML – *Hypertext Markup Language*. Programming language largely used to create Web pages. HTML commands format a web page appearance and behavior. It creates what you see on the screen.

HTTP – *Hypertext Transport Protocol*. The language that connects users to Web servers and sites.

HYPERLINK – The ability to attach a live link from a Web or desktop location, routing a user to a desired location on the Web.

INTEGRATION – *Integration* allows access to multiple software programs and databases seamlessly to the actual user.

IP – *Internet Protocol*. Also referred to as TCP/IP or Transmission Control Protocol/Internet Protocol. Standards that establish Web addresses, network addresses and routing of e-mail traffic.

IVR – *Interactive Voice Response*. Is defined as automated response and routing for inbound calls.

JAVA – A leading Internet language developed by Sun Microsystems moving largely today to replace traditional client/server architecture. Users are able to access JAVA applets to run software applications remotely with only an Internet browser.

KM – *Knowledge Management*. The art of data mining from internal and external data sources and consolidation of this to user defined pages and displays. Follows the concept: "from data comes information, from information comes knowledge."

MIDDLEWARE – This term is used in many ways. Basically, middleware is the software "glue" that helps programs and databases that may be on different computers work together. More formally, Gartner Group defines middleware as "runtime system software that directly enables application-level interactions among programs in a distributed computing environment." Its most basic function is to enable communication between application programs or DBMS's within a single-application system or across multiple-application systems.

OLAP – *On-Line Analytical Processing*. An extension of business intelligence or KM allowing decision makers to see criteria data presented in real-time on-line format, rather than traditional after the fact or post time.



PDA – *Personal Digital Assistant*. Refers to portable, typically handheld microcomputers allowing users to collect and process data while offline from a network.

PORTAL – Directed and often secure gateway to data or content via the Internet.

POS – *Point Of Sale*. Refers to cash register type transactions such as retail or food and beverage industries.

PD – *Predictive Dialing*. The ability to route and balance outbound dialing from a phone bank.

PHONE QUEUE – A *Phone Queue* houses incoming phone calls until personnel become available to receive the calls.

PRM – *Partner Relationship Management*. A derivative of CRM, however, focused on managing partner relationships.

REAL-TIME – Refers to the immediate access to a given piece of data by multiple users throughout the different departments or divisions of a company in real-time.

RETURN ON INVESTMENT (ROI) – A financial measure used to quantify the desirability of promoting a particular effort. Return on Investment compares the benefits returned to the enterprise against the cost required to implement it. It is usually expressed as a ratio.

SEGMENTATION – Technique of identification, on the criteria chosen, of groups of potential customers with the same requirements and needs (e.g., with regard to the product offered). Four broad types of criteria may be distinguished:

1. Geographical (territory, region, housing micro-area)
2. Socio-demographic (age, income, sex, profession, etc.)
3. Behavioral (purchase situation, user status, etc.)
4. Psycho-graphical (social class, lifestyle, cultural class, etc.)

SFA – *Sales Force Automation*. Software and hardware tools providing sales opportunity management, forecasting, orders processing, sales resource management and customer assignment.

SQL – *Structured Query Language*. A relational database language for the orientation, definition and manipulation of data.

SYNCHRONIZATION – A comprehensive CRM solution allows organizations full synchronization of data over LAN's, WAN's, dial-up connections and the Internet.

TAPI – *Telephony Application Program Interface*. The ability for Windows based programs to manage and perform telephone features such as outbound dialing, forwarding or routing.



TES – The application of *technology to enable selling* through all desired sales channels, including field/mobile sales, inside sales/telesales, selling partners, Web selling, and retail sales.

WAP – *Wireless Application Protocol* is a standard allowing access to World Wide Web through mobile devices such as mobile telephones and handheld devices.

WORKFLOW MANAGEMENT – There are two types of workflow management: 1) *Internal and external process integration* is a workflow approach that allows for the definition of business processes that span applications, including those that come from different vendors. This usually requires a standards-based commercial workflow development environment. 2) *Automated events or processes* — a workflow approach that enables automated tasks (e.g., the automation of steps in a marketing campaign or a sales process) to be performed.