

# Jocelyn Eisenberg, SAP Global Marketing

“Things To Consider When Implementing ARchitect”.



# Things To Consider When Implementing ARchitect

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Proper implementation of ARchitect can drive significant benefits to organizations adopting ARchitect. It is critical to establish consistent data entry standards across users and across business units. This will make generating briefing books and other management reports a much easier task.

Jocelyn leads the effort to institutionalize the use of ARchitect in a diverse and decentralized AR program. In this presentation, she will draw upon the experience she gained in implementing ARchitect at SAP, while retiring an old, internally developed system.

# You had me at “Hello” “Briefing Books”

## Started using ARchitect more than 10 years ago

- As a single user (two different firms)
- ... a Global AR team leader with users in different geographies
- ... at KCG as a contractor



And then I joined SAP... where there was no ARchitect!!!



# The Time Will Come

Software companies want to eat their own dog food. Eventually, the amount of customization required, and ongoing maintenance of a standard CRM tool will prove not to be worth the investment.

So, SAP, after years of investment in a customized version of CRM that few were using finally “retired” the tool. We exported the database of analysts.



# Hooray! Now we have ARchitect!

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# But, Uh Oh! Some Challenges

## No previously mandated tool

- Resistance to change work styles, even knowing the benefits of having interactions in the tool. “No time” to learn a new anything when you’ve got MQs, Waves, stakeholders, events to manage.
- Concern about work being tracked, inspected, or measured



## Several independent teams, with different managers, no clear owner at a corporate level

- Challenges getting participation, impacting value of the tool overall
- Inconsistent information, impacting reporting
- Keeping data private to groups/teams



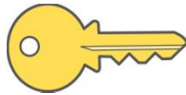
# SAP AR Structure – Easier When Centralized

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**DECENTRALIZED STRUCTURE**



**CENTRALIZED**



# Key Learnings: Organizational level

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**For large organizations, it is critical to establish consistent data entry standards across users and across business units. This will make generating briefing books and other management reports a much easier task.**

- Difficult in a decentralized environment

**Decide on which interaction types to use. Do you need to know how many interactions were “research review” or “phone call” or “relationship building”. Make it simple.**

- Start with what you want to get out of it. Get some data in, run a report, and see if it’s usable. If not, streamline. Rinse. Repeat.



# Key Learnings: People level

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## **Don't underestimate resistance and fear**

### **Fear of change**

- Invest the time up front to figure out what you want to track. Do you need broad categories, like Cloud and Mobile, or do you need to take it to a product/solution level? Industries? Geographies? Markets?

### **Requires willingness to change work processes/styles**

- Need to show benefits to individuals or they won't do it
- May need to be mandated/institutionalized for some to adopt

# Helpful getting started tips to institutionalize

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## **Import some real data**

## **Set up coverage groups for the users**

## **Capture the right information, right away, the first time**

- Develop some guidelines specific to your org (major initiatives, product level, geography, industry) and tag from the start – don't go back and do it again

## **Have a champion**

- Monitor and identify the issues
- Correct, train, give tips, explain, provide support



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