



**Standardize pipeline management
and strengthen customer touch points
Fujitsu's Goals with the OneCRM
Project**



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CaseStudy



This is an internal case study of Fujitsu's efforts to standardize pipeline management and strengthen customer touch points on a global basis, with the aim of achieving data-driven management and operational excellence.

Issue

01. Fujitsu needed to change to an issue-solving approach, where it not only builds and introduces IT systems, but also shares issues with customers and collaborates with to find solutions.

Issue

02. When considering global business strategies, the definition of the stages of the business opportunity pipeline differed by country or region, and the content and progress of opportunities could not be properly managed.

Issue

03. One business partner was in charge of everything from first contact with the customer, as well as contracting and maintenance after IT system installation. This one business producer approach needed to change to a data-based division of labor system.

Solution

01. Launch an initiative to utilize customer data centrally managed in the CRM by different departments and leverage it to consider potential needs and issues, and propose solutions.

Solution

02. Operate a standardized pipeline in Salesforce globally, properly manage business opportunities and progress in order to visualize the entire business.

Solution

03. Shift to a model of division of labor and collaboration with divisions and departments with expertise, such as digital sales, depending on customer needs, issues, and pipeline conditions to improve response efficiency.

interviewee

Shunsuke Baba

EVP CDPO

Masayuki Kita

Senior Director, CDPO
Division in Corporate
Executive Office

Ayako Tanaka

Senior Manager, CDPO
Division in Corporate
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Keiji Tomohiro

VP, Head of Digital Sales
Division in Global Marketing
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Background and Issues

Drastic changes in the environment surrounding customers and Fujitsu

Changes in the awareness and behavior of each individual are essential

Many companies are now required to change. Many issues are arising that will have a major impact on the continuity of corporate business and people's lives, such as the rapid changes in the global situation, extreme weather conditions, and the response to the COVID-19 pandemic. What kind of efforts are needed for companies to realize sustainable growth? In his analysis of the current corporate environment, Shunsuke Baba, EVP CDPO, found that: "The speed of change is much faster and the impacts are much greater than in the past."

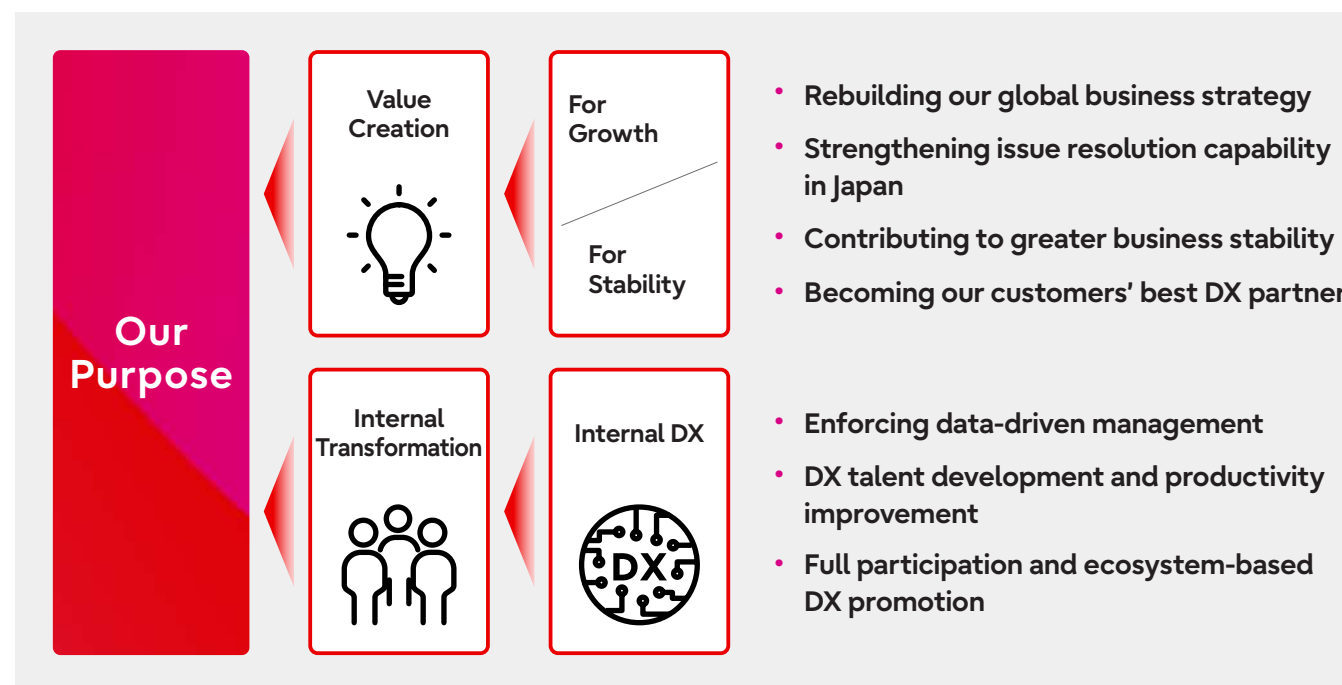
In order for companies to respond quickly to these rapid and significant changes, they can no longer rely on intuition, knack, and experience that are based solely on the past best pattern, knowledge, and know-how. It is important to collect a variety of data on sales, costs, changing customer needs, raw material procurement, and other factors to visualize the business situation and quickly take the next step in response to changes.

However, that step is not necessarily an extension of the business as it has been done in the past. "In these uncertain times, it is becoming increasingly difficult to make correct and prompt decisions about the direction in which a company should move. What is required now is to move forward by pivoting on the core business as an axis. This is to be repeated in a short cycle to determine the direction to proceed," says Baba.

Under these circumstances, customers' expectations of Fujitsu are also changing. Masayuki Kita, Senior Director, CDPO Division, Corporate Executive Office, explains the change: "We used to receive clear requests from customers, saying 'This is the kind of system we want.' However, this has changed rapidly over the past four to five years. Customers now want Fujitsu to work with them to clarify the issues they are facing. They are expecting an issue-solving approach in which issues are first made clear and then solutions are proposed."

This means that Fujitsu itself must also change in order to fulfill its role as a partner in realizing issue-solving initiatives and co-

creation. Therefore, Fujitsu has launched a company-wide DX project called FUJITRA in 2020. This is an initiative to transform Fujitsu from an IT services company into a DX navigator. We are committed to our Purpose of making the world more sustainable by building trust in society through innovation and we will work on resolving issues such as "restructuring global business strategies" and "strengthening data-driven management," to realize our Purpose and promote company-wide DX and the transformation of employees themselves through these efforts.



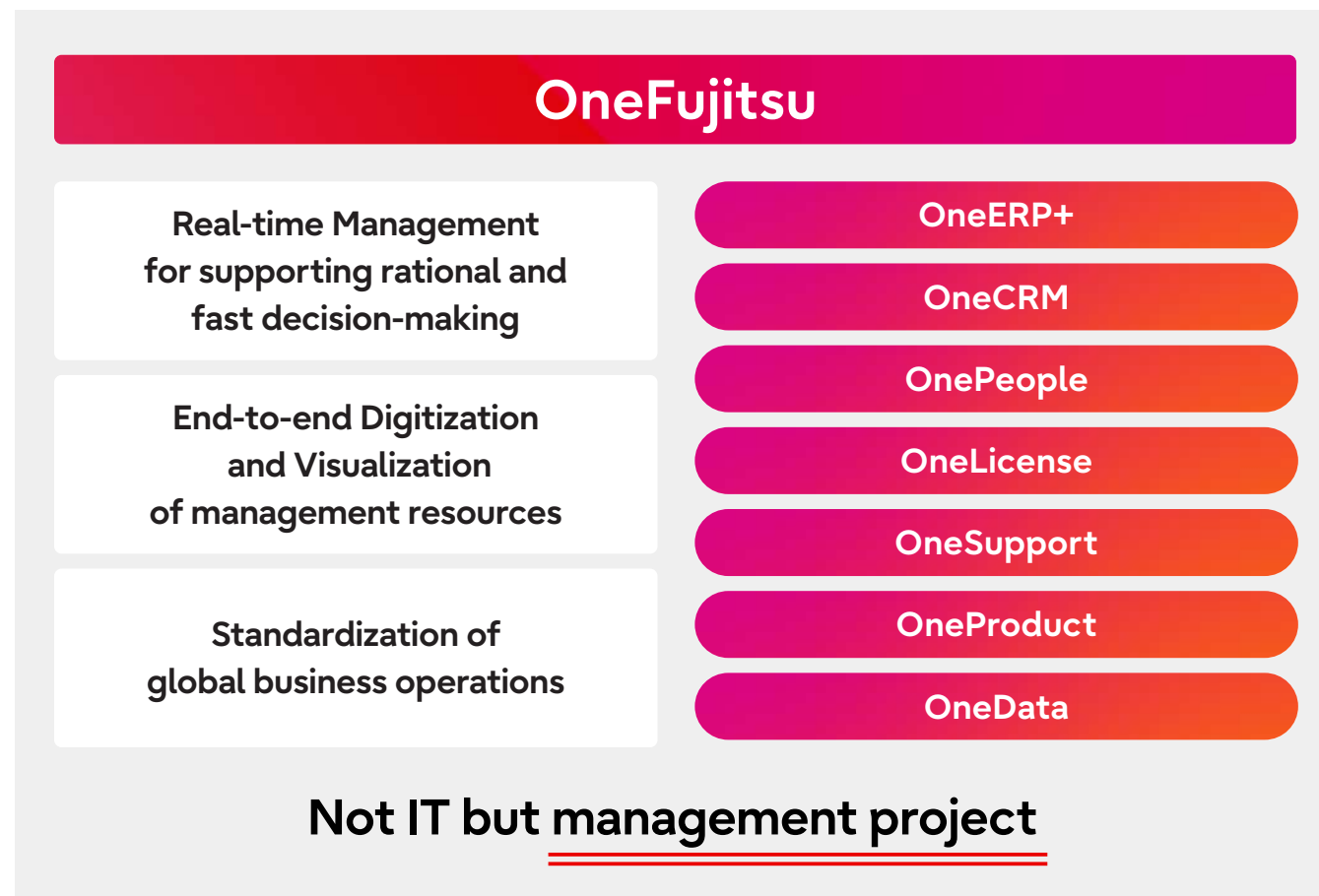
Seven challenges to tackle in order to transform into a DX company

How it started

"One system for one function" globally Management projects to standardize management, operations, and IT

While all employees join Fujitra and take on challenges, Fujitsu has the OneFujitsu Program as a specific program, this is an initiative to standardize the company's management, operations, and IT, and to evolve into a data-driven company. The goal is to standardize all major operations as "one system for one function" globally. "The One in OneFujitsu has the implications of being "one globe". We will standardize management, operations, and IT globally to create best practices and create Fujitsu's core values. This is not just an IT implementation, but a business management project." (Baba).

Moreover, the OneFujitsu program "is moving forward with globalization, standardization, and core value considerations, all at the same time. If we were to do things in order, as we have done in the past, and say, 'Let's start from this region,' the situation would change by the time the standardization was completed in that region, and we might have to rethink the project from scratch. We are working with a much shorter time frame than before," says Baba.



OneFujitsu Program to realize Fujitra

Initiative

OneCRM—A core of the OneFujitsu Program of the OneFujitsu Program

Under the OneFujitsu program, Fujitsu is working on the OneCRM Project to standardize pipeline management and strengthen customer touch points globally. When considering DX in areas such as marketing and sales (BP: business producer), the results of these tasks often depends on the skills and abilities of individuals. Since it is a fact that relationships are built on trust between people, there is a strong opinion that standardization is not suitable for these tasks.

On the other hand, it is also true that there are companies that have thoroughly standardized their marketing and sales techniques and have achieved success. However, most of the successful global standardization efforts in the CRM area are examples of companies outside of Japan. Best practices from those cases often do not fit Japanese companies. “Our Japanese clients are looking for best practices that suit Japanese companies. How do we create these? We are working on the OneCRM project as an in-house practice for this purpose,” Kita said.

OneCRM promotes the following three main objectives

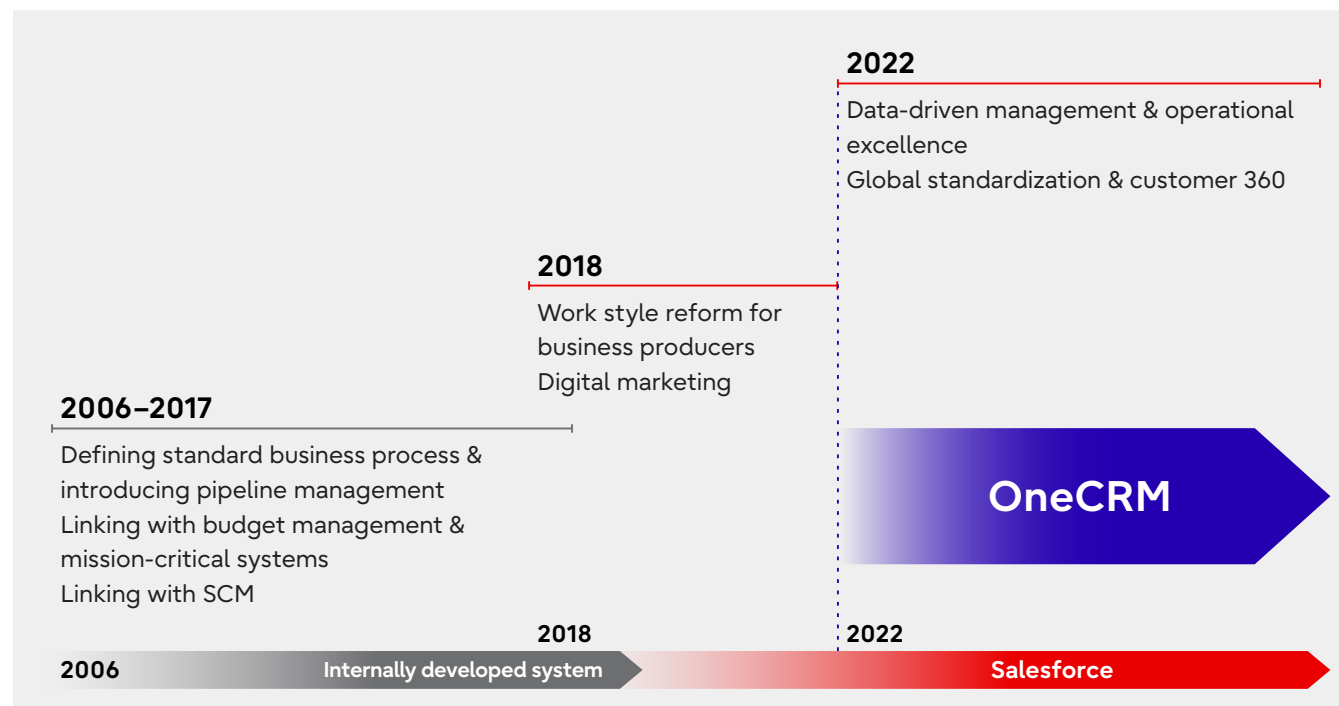
- **Standardization of pipeline management**
- **Sophisticated business management through centralized global data management**
- **Strengthening customer touch points**

Visualizing the status and progress of business opportunities globally

Standardizing pipeline management

Pipeline management, one of the initiatives in the OneCRM project, is promoting global visualization of the status and progress of business opportunities. Ayako Tanaka, Senior Manager, CDPO Division, Corporate Executive Office, recalls, “In the past, the definition of pipeline stages differed in each country or region, making it difficult to accurately grasp the status and progress of opportunities on a global basis. In addition, in many cases, the staff member in charge had to interpret the data based on the manual to ensure consistency, for example, “This stage of the pipeline in this country corresponds to this stage in another country,” which required human judgement and work.

In response to these issues, Tanaka explains, “The first thing we did was to make sure that the pipeline stage definitions were the same globally.” Specifically, in order to standardize as quickly as possible, the projects were conducted based on the concept of Fit to Standard, where the best practices of Salesforce, Inc. were used as the standard, and the business



Efforts to reach OneCRM

Initiative

processes and pipeline stages of each region, each country, and each group company were defined accordingly.

However, when the actual standardization started, some new issues were brought to light in the process. Fujitsu's opportunity management is often integrated with quality and governance check processes. "We conduct checks at various phases of the business opportunity to see if there are any issues that could pose a risk in proceeding. In order to standardize this arrangement on a global basis, the legal

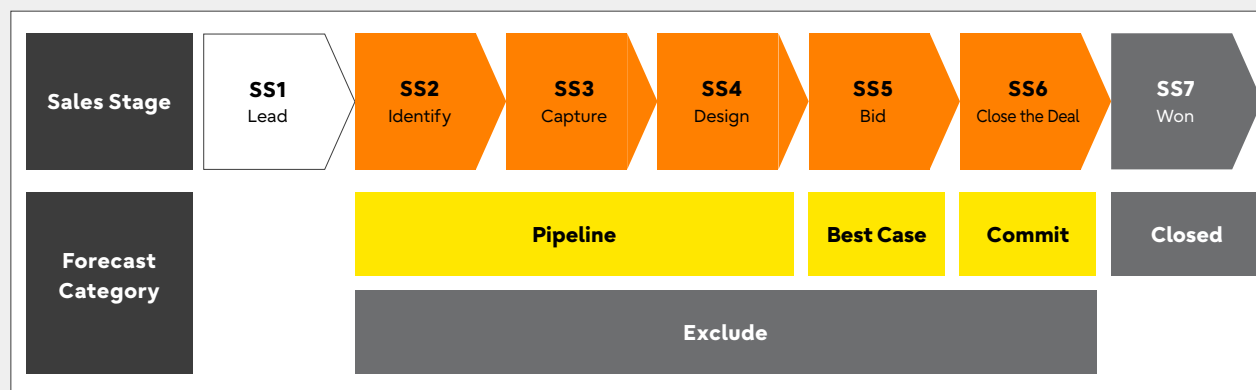
staff of each country must also be involved. It took a lot of manpower and time," said Tanaka. "We then worked to standardize pipeline management on a global basis by carefully explaining our objectives and aims so that everybody understood why it was necessary to standardize the stages of the pipeline."

Changes in behavior at all levels of executives, managements, and frontline sales

In standardizing pipeline management, it is also important to raise awareness at the executive and management levels. Forecasts reported at board meetings and various departmental meetings are no longer based on reports prepared by the sales department as in the past, but are now based on globally standardized data collected in real time, and the process done by executives is being transformed to reflect this change.

Next, we are working with the HR department to review the sales training system, including at the management level. "Until now, Fujitsu has used the concept of on-the-job training to learn management and processes unique to the workplace, but this will not change the way work is done even if tools and definitions are standardized. Our aim is to promote understanding of basic knowledge, behavioral patterns, and management and operational patterns for global standard pipeline management by a new educational system," says Kita.

Tanaka looked back on her long experience in sales in the manufacturing industry and commented on standardized pipeline management: "Many customers want to know Fujitsu's efforts as a reference to see how Fujitsu—also in the manufacturing industry—is trying to shift to a DX company. At the same time, I have also heard some people within Fujitsu say, 'If we don't change now, Fujitsu will remain the same forever,' and I feel that all employees have a strong sense of the need to change. We hope to demonstrate to our customers the process of Fujitsu's transformation through the OneCRM project."



Before

- Pipeline definition and standards differed depending on departments and individuals
- Assumptions about the numbers registered in the system and the actual status of business opportunities could not be known without hearing the report
- Report was always correct rather than information in the system

After

- Registration of opportunities by global
- definition Management based on the data in
- OneCRM Reduction of workload on reporting

Initiative

Finding clues to solve potential problems Aiming to be an inside sales person as a good partner to the business producers

Another objective of the OneCRM initiative is to strengthen customer touch points. The conventional style of business producers (BP) has been to provide solutions to the issues consulted by the customer's IT department and build and implement IT systems. This is an activity to clear up the apparent problems felt by the customer, and from a different perspective, it can be seen as a passive style of waiting for consultation from the customer.

Keiji Tomohiro, VP, Head of Digital Sales Division, Global Marketing Unit, explains, "The sales style that will be required in the future is to identify potential issues before customers are aware of them and propose solutions to address them. We believe that inside sales is essential to find clues to solve these potential problems."

When people hear the term "inside sales", they generally tend to think of it as a sales assistant, but what exactly makes Fujitsu's inside sales different?

As the expression enterprise inside sales suggests, Fujitsu's inside sales activities do not end with making telephone appointments, but rather focus on identifying the latent needs of the customer. This is a different approach from the usual inside sales approach, which is to take an issue-based approach to find apparent needs.

"In addition, we also focus on picking up company-wide issues,

rather than individual issues, and approaching the business units. In a nutshell, Fujitsu's inside sales aims to be a good partner for business producers, rather than a superior or inferior," says Tomohiro.

Promote understanding of inside sales through briefing sessions for related departments, cooperation with the business producers, and use of media

We faced many difficulties when introducing inside sales as part of our efforts to strengthen customer touch point. In order to make inside sales a bridge between the marketing and sales departments, we repeatedly briefed the relevant departments within the company, and we also made sure to communicate closely with the business producers (BPs) in charge.

In collaboration with business producers (BPs), information was kept on OneCRM, a dashboard was shared to check the status at any time, and progress meetings were held once every two weeks. In addition, when explaining the project to the relevant departments, we tried to use expressions that would be easy to understand without using technical terms or English expressions.

"In addition to these efforts, we continue to communicate the initiatives of our own department internally and externally through the use of internal newsletters and external media. Also, since words alone may not be enough to gain sufficient

understanding of inside sales, we promoted educational activities such as videos and PoC (proof of concept) was proposed to business producers (BPs) and business units (BUs). We actually conducted a PoC with 20 divisions. As a result, 95% of the respondents indicated that they would like to continue the program," said Tomohiro.

Future Outlook

I want to show you how Fujitsu has changed through OneCRM project

Fujitsu began OneCRM project in April 2022, but in the course of its efforts to this point, the company has also identified areas for improvement. The workload on frontline employees is one such example. In order to standardize pipeline management globally, the data entered by each business producer (BP) must be standardized. "For the business producers (BPs), I think their honest impression is, 'There are so many items to input.' The next major challenge is to show in what way the data entered is being effectively utilized globally and how it is being returned as a benefit to the business producers (BPs)." (Tanaka)

It is also important to consider how various departments and divisions can utilize the customer data centrally managed by OneCRM and how they can enhance their ability to respond to customers. If the various departments and divisions can understand the needs, issues, and progress of business opportunities based on customer data, and approach customers at the appropriate time in light of their own expertise, our ability to respond to customers will be strengthened.

How will the OneCRM project progress in the future? Tomohiro says, "Currently, customers who are highly sensitive to areas such as digital sales and DX are interested in Fujitsu's initiatives. I feel that the OneCRM project needs to evolve so that it becomes an indispensable mechanism that many companies would not be able to survive without it."

Kita, on the other hand, considers "the next step would be how to enhance our ability to respond to customers by utilizing globally standardized data." "I want to show that Fujitsu's business is improving as a result of implementing OneFujitsu program, including OneCRM project," Baba says. The direction Fujitsu is heading towards is clear.



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