

CURIE: Towards an Ontology and Enterprise Architecture of a CRM Conceptual Model

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Appendix (available online via <http://link.springer.com>)

**Appendix A CURIE: Towards an Ontology and Enterprise Architecture of a CRM
Conceptual Model (Supplementary material)**

Table 1: Common CRM concepts from 5 CRM comparison. Source: Cruz and Vasconcelos (2015)

Sales	Marketing	Services	Reporting	Integration	Security	Other features
<ul style="list-style-type: none"> – Account management – Activity management – Competitor tracking – Contact management – Contract management – Lead management – Opportunity management – Product catalog and management – Quote management – Territory management – Quota management – Order management – Sales pipeline – Sales forecasting 	<ul style="list-style-type: none"> – Campaign management – Campaign execution – Email marketing – Marketing campaigns – List management – Web lead to capture – Lead management 	<ul style="list-style-type: none"> – Case escalation and notification – Case routing and queuing – Contact center – Case management – Customer self service portal – Email management – Knowledge base – Customer view – Service analytics – Service contracts 	<ul style="list-style-type: none"> – Custom reports – Dashboards – Sales analytics – Marketing analytics – Service analytics 	<ul style="list-style-type: none"> – Social networks – Email integration – Web-services api – Soap integration – Microsoft office integration – Automatic call distributor – Computer telephony integration – Cloud connectors – Integrated third-party apps 	<ul style="list-style-type: none"> – Role based security – Advanced password management – Control data access – User based security – Team based security – Audit trail 	<ul style="list-style-type: none"> – Workflow and processes automation – Document management – Mobile and offline access – Calendar management

Table 2: Main CRM concepts from 40 CRM comparison. Source: Business-Software (2021)

Marketing	Sales	Services	Other features
<ul style="list-style-type: none"> - Lead generation - Lead nurturing - Lead scoring - List Segmentation - Campaign management - Community building - Marketing resource - Brand management 	<ul style="list-style-type: none"> - Service catalog - Opportunities management - Competitor tracking - Quotes management - Orders management - Contract management - Invoices management - Billing management - Commissions management 	<ul style="list-style-type: none"> - Project management - Service contracts - Tickets management - Knowledge base 	<ul style="list-style-type: none"> - Account management - Contact management - Customer lifecycle management - Contact center - Task management - Audit trail - Workflow management - Content management - Document management - Omnichannel support - Collaboration tools - Customer satisfaction management - Data Imports - Email management - Social media management - GDPR compliance - Mobile support - Analytics - Security - Integrations - Employee management - Organization management - Forms management

Table 3: Main CRM concepts from Gartner Magic Quadrant. Source: Gartner, Inc. (2021)

CRM Lead Management	Sales Force Automation	Multichannel Marketing Hubs	Voice of the Customer
<ul style="list-style-type: none"> – Multichannel lead management – Lead aggregation – Lead augmentation and deduplication – Lead process management – Lead nurturing – Lead scoring and qualification – Analytics and measurement – Integration with other applications 	<ul style="list-style-type: none"> – Account and contact management – Activity management – Opportunity management – Guided selling – Forecasting management – Reports and dashboards – Mobile – Partner relationship management – Platform and integration – Lead management 	<ul style="list-style-type: none"> – Customer profile management – Campaign workflow – Event triggering – Personalization – Marketing channel support – Real-time decisions/recommendations – Marketing analytics – Integration with other applications 	<ul style="list-style-type: none"> – Customer feedback collection through multiple channels – Customer direct feedback – Customer indirect feedback – Customer inferred feedback – Customer actionable insight

References

- Business-Software (2021) Top 40 customer relationship management software report: Comparison of the leading CRM software vendors. Available at <https://www.business-software.com/offer/top-40-crm-software/> (Accessed 27 Dec 2021)
- Cruz A, Vasconcelos A (2015) Towards a reference enterprise application architecture for the customer relationship management domain. In: Proceedings of the 17th international conference on enterprise information systems, SCITEPRESS – Science and Technology Publications, Lda., ICEIS 2015, vol 3, pp 185—195
- Gartner, Inc. (2021) Gartner magic quadrant and critical capabilities. Available at <https://www.gartner.com/en/research/magic-quadrant-critical-capabilities/> (Accessed 27 Dec 2021)