# Chapter 13
# The SCM, CRM Information System, and KM – An Integrating Theoretical View:
## The Case of Sales Force Automation

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## ABSTRACT

*Many researchers have treated the sales force automation (SFA) and acknowledged its benefits for the company. However, very few of them have considered the SFA as an effective tool of customer relationship management. Hence, this present chapter aims to advance a new theoretical and managerial vision where the SFA is revisited through the consideration of the customer relationship management but also, by scrutinizing its key role through the knowledge management to optimize the commercial function as a crucial aspect of the supply chain management. Particularly, the impact on the sellers' performance will be discussed. In this case, the commercial function is concerned as a partial supply chain.*

## INTRODUCTION

In a global economy characterized by an increasingly vehement competition, the technological advancements are the most remarkable changes in the business environment and societies. In fact, faced with customers who are becoming more and more demanding, companies need more accurate information to keep up with competitors and to develop effective and reliable IT systems according to their new management methods.

These methods are essentially based on cooperation and information sharing. In fact, the integration of SI accounts for a structural approach that aims to speed up both intra and inter-organizational processes; similarly, it aims at unifying the repository data for the entire organization structuring. Subsequently, companies are led to integrate cross-disciplinary applications namely the tools of operational customer relationship management (CRM) such as sales force automation (SFA). This in order to ensure on the one hand, the supply chain management (SCM), i.e. specifically the commercial function organization, among other, the optimization of administrative and routine tasks of sellers; and, the CRM, on the other hand.

Within this context, this chapter provides a theoretical development where the focus is mainly on the SFA as an information and communication technology. The latter targets the sellers in order to manage the customer relationship; it also underlines the benefits of SFA with regard to the organization notably the commercial function and sellers' performance.

There is a paucity of research investigating the SFA as an operational tool of CRM despite its significant role in ensuring a competitive edge and a business performance. It follows that this research is timely as it sheds light on this under researched question, its relationship with CRM while stressing its role in the management of partial supply chain in order to optimize the commercial well functioning.

It follows that, this theoretical development will encompass the SFA as a principal IT system method of information management inherent to the CRM and at the same time, will illuminate the supply chain management through the notion of partial supply chain.

In a nutshell, this type of cross-information system is crucial for any organization that wishes to optimize the management of the sales force and CRM to ensure a competitive advantage and maintain its position on the market.

This chapter aims to present the SFA while highlighting its theoretical foundations, principles in reference to the researches sources into the field of information technology and communication (ICT) as well as its relationship with the knowledge management (KM) concept. Consequently, this chapter will consider both the information system management, its implementation into the framework of supply management while stressing the role played by the knowledge management. This makes this chapter proposal blends nicely to the book through a better understanding of how information management systems are decisive for supply chain plans.

Accordingly, the concept of SFA will be clarified through two close disciplines namely: information and management of sales force systems. The first section will critically discuss the key concepts. In this framework, the evolution in terms of SFA's definitions, its related approaches while specifying its perimeter will be critically presented. The second section will be interested in the relationship between CRM and SFA while presenting the various actors in the SFA. Finally, the third section will investigate the role of automation of the sales force in the management of partial supply chain. Hence, this section will scrutinize the SFA benefits as a cross disciplinary system concerning the sellers to optimize their commercial functions and to enhance their performance. In this case, the role of knowledge management will be stressed through the CRM system analysis. It follows that, this chapter will highlight the sellers' knowledge management through to the use of SFA. The latter enables the acquisition, capture, share, and analysis of market information in general and those of the customer in particular. In this instance, the knowledge management theory will be devoted to understand the SFA success on the one hand, and the enhancement of seller's competencies in term of CRM, on the other.

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