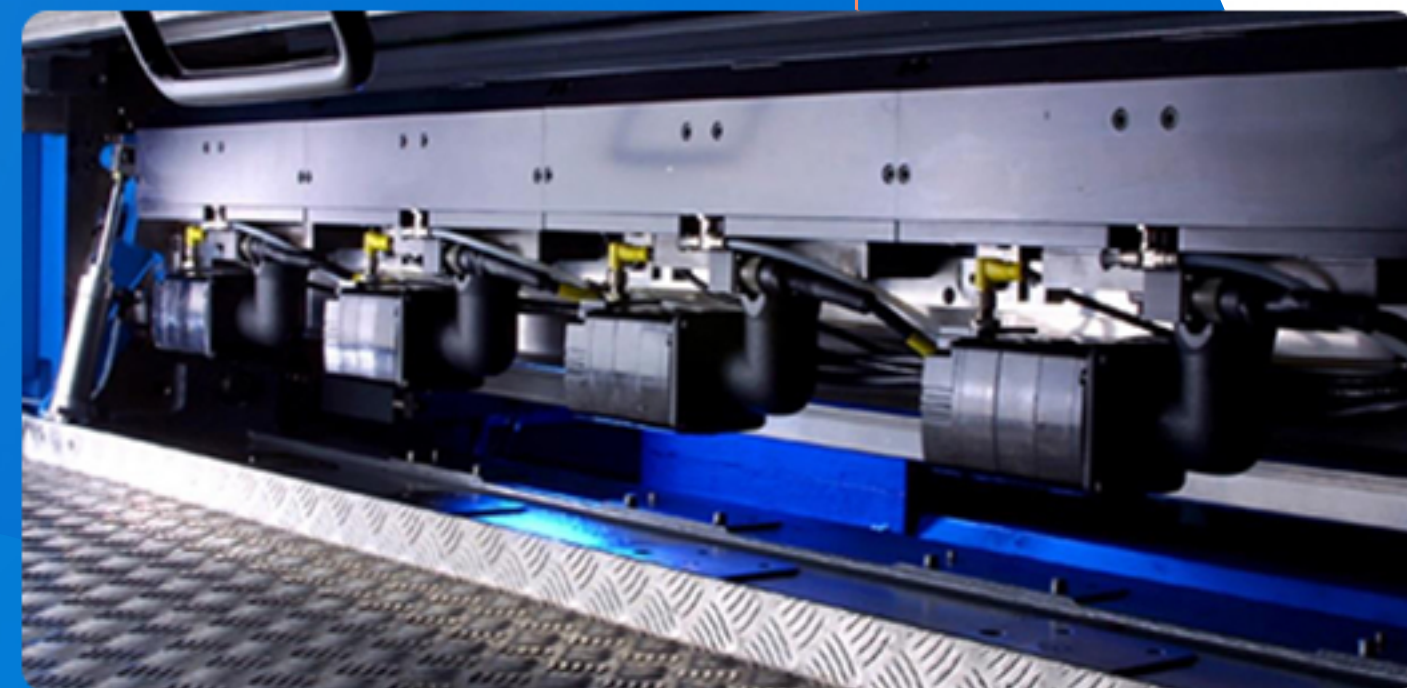


# Enterprise **CRM with Automated Sales, Operations and Support Services** for a Leading Industrial Printer Manufacturing company



## About the Client:

- ◇ Our client represents more than 170 years of innovation that has continuously enhanced the value, viability, and competitive position of print media. Supplies presses and finishing systems, including the most automated and productive web offset presses in the world, for magazine, newspaper, packaging, catalogue, direct mail, and other printing applications.
- ◇ The company is differentiated by its printing process knowledge, high-tech industrial manufacturing capabilities, engineering expertise and ability to execute and support large-scale capital equipment projects.
- ◇ Headquartered in USA and has major manufacturing centres in North America, Asia, and Europe as well as a global sales and support network.
- ◇ Supplies presses & finishing systems, including the most automated & productive web offset presses in the world, for magazine, newspaper, packaging, etc



## What bothered them

- ◇ Client was using a strong ERP system, however, was not having a consolidated, efficient CRM system in place to empower their sales teams.  
OEM, parts, aftermarket and service, each sales team had their own set of processes and tools.
- ◇ Due to heterogeneous processes and repositories, there was huge challenge to have uniformity in reporting and MIS.
- ◇ Legacy Software used for quote process was very old and could not be supported due to obsolete of used technology.
- ◇ Parts, aftermarket, and service quotes were created manually thus leading to errors and inefficiency.
- ◇ Contract repository was maintained in an ad-hoc Access based unreliable system.
- ◇ All the standalone CRM tools were not integrated with back-end ERP system. This was causing severe inefficiencies and limitations in operations.





## The Aress Approach

To address the challenges faced by our client, Aress initially engaged in a two-week consulting engagement. After understanding the requirements in detail and doing a fit-gap analysis, we have provided below solution:

- ◇ Implementation of SteelBrick CPQ system (Configure price Quote) to automate the complex process of generating OEM proposals. This helped to conduct margin analysis, visible to executive users for an OEM proposal.
- ◇ SAP Integration: Real time data synced up with SAP and vice-versa.
  - o Customers and Contacts:
    - Salesforce to SAP for Customer creation
    - SAP to Salesforce for updating SAP Customer ID and billing address
    - Salesforce to SAP for Contact billing details.
  - o Customer Cases – Sending notifications from Salesforce to Sap.
  - o Parts and Service Order – Share Order details from Salesforce to SAP and when order is updated in SAP, share the updated details runtime back to Salesforce.
  - o Equipment, Products (Parts) and Prices: All updates from SAP will be passed to Salesforce once in a day using batch sync process.
- ◇ Parts, aftermarket, and service quote implemented using SteelBrick along with salesforce customization to implement unique requirement of account-based pricing.
- ◇ To alert executives creating quotes and orders, instant message pop-up on account and product selection.
- ◇ Sales and service team are empowered to create leads, opportunities, orders, and cases on the fly.
- ◇ Implementation of customer community to enable customers to directly create a quote or place an order also provided advanced quoted features to customers.
- ◇ Implementation of a custom process to analysis and report sales trend variation for different parts bundled into categories.
- ◇ All relevant data updates in CRM are real time / batch synced up with back-end ERP system and vice-versa.
- ◇ Implementation of chatter for internal and community users



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Equipment

M-500

Case Owner

Jhon Headen

Case Number

00001216

Sold to Account Name

James Software Services

Service Order Charged Hours

Contract

00000104

Contact Name

Contact Email

Edit

Delete

Log a Call

New Task

Show More

Cancel

Create Customer ...

Save

Customer Trip Id

\*Account

James Software Services

X

Equipment

M-500

X

Contact

Trip Details

Customer trip for M500

Owner

Dnyanesh Gawali

Record Type

Generic Trip Entry

Cancel

Create Case

Save

CASE INFORMATION

\*Equipment

Case Owner

Dnyanesh Gawali

Case Number

Sold to Account Name

Service Order Charged Hours

0

\*Contract

Contact Name

Cancel

Create Lead: OEM

Save

Lead Status

New

Lead Source

--None--

Rating

--None--

Lead Converted

☐

Lead Owner

Dnyanesh Gawali

LEAD INFORMATION

Name

--None--

First Name

Last Name

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## Benefits

Aress analytic expertise helped company achieve following benefits:

- ◇ Aress solution led to increase in efficiency and reliability of CPQ (Configure price Quote) process.
- ◇ Enhance decision making process in OEM sales cycle due to complete transparency in margin of a deal.
- ◇ Improved efficiency and uniformity of parts, aftermarket, and service CPQ (Configure price Quote) and order process.
- ◇ Gained enhanced visibility to every business line
- ◇ Complete transparency of sales rep's day to day activities
- ◇ Greater visibility from lead management to order closures
- ◇ Quick issue resolutions for customer complains
- ◇ Unifying all the stake holders on a single platform, i.e., sales reps, managers, technical teams etc.
- ◇ Enabling sales & marketing to engage in more business generating activities
- ◇ Eliminated manual systems and paperwork.
- ◇ Seamless order booking process with mobility flexibility.
- ◇ Reports and dashboards to analyze ROI
- ◇ Increased sales due to onboarding of customers thru community.
- ◇ Better customer experience due to increased collaboration and customer service.

