

Increasing Effectiveness in Sales of Special Machines with PiSA sales CRM Support

case study

In respect of CRM, the Alfing Kessler Sondermaschinen GmbH banks on PiSA sales. Marketing, sales and the customer service department of the "pioneer of connecting rod processing" profit from the solution. The integration of the PiSA sales standard interface to the ERP system *PSI_{pent}a* underlines the innovative approach of the project.

ALFING



Picture: Alfing Kessler Sondermaschinen

Customer

Alfing Kessler Sondermaschinen GmbH

Sector

Mechanical engineering, manufacturer of transfer lines and flexible manufacturing systems

Area of application

Contact management
Technical sales and distribution
Marketing
Service management

Project data

Launch 11/2007
In operation since 02/2008
PiSA sales 4D
Database ORACLE 10.2

Integration

Standard interface to the ERP system *PSI_{pent}a*
Integration of MS Office applications
Groupware MS Outlook

Customer & Sector

Since 1938 the Alfing Kessler Sondermaschinen GmbH is a global partner of the automotive ancillary industry. As a manufacturer of transfer lines and flexible manufacturing systems AKS has gained world-wide reputation. Many manufacturing processes, for example the connecting rod break, were introduced as a serial production on AKS machines for the first time. The company of the mechanical engineering branch is situated in Aalen and employs about 400 people.

Initial Situation & Challenge

With the introduction of a CRM solution the special machine builder wanted to increase the efficiency of all customer-oriented areas in the company. That means in particular improving the contact management and establishing an integrated activities and document management. Staff members should be able to create quotes more quickly and easily, trace sales projects more comfortably as well as control marketing campaigns. A main requirement was to connect the CRM software with the ERP solution *PSI_{pent}a*, which is used by AKS. The aim was to establish an integrated application environment. The CRM system ought to be the leading system, customer data are transferred to the ERP system.

For that reason AKS looked for a supplier, whose CRM solution is characterized by a consistently

integrative concept, based on established standard technologies. The ideal solution should integrate a neutral ERP interface which is extendable concerning the number and the type of the attributes. Furthermore, to meet the requirements of marketing, sales and service, the following CRM features should be offered as part of the standard software product:

- + Common sales information system with contact management, activity management and document management including MS Outlook and Office integration
- + Quote management with quote processing by operating departments including workflow support and product configuration
- + Product configuration for special machines, based on subassemblies that can be selected as an option or as commodities
- + Automated creation of the quote text in several languages according to the product configuration using text modules.
- + Substitution of the previous Excel calculation by calculating directly in the CRM system, on the basis of neutral defined calculation groups
- + Capture service calls and simultaneously check up products installed for the customer
- + Generate service orders including transfer to the ERP system for accounting
- + Administration, time scheduling and resource planning of field service operations

Project Course & Solution

The main reasons for the project team to decide in favor of PiSA sales are the huge number of configuration possibilities (e.g. report development tools), the possibility to integrate the CRM solution seamlessly into the existing IT-landscape and finally, the modern user interface for easy and intuitive operating.

„With the help of PiSA sales our sales staff is able to generate quotes faster and less error-prone. The complete documentation of all activities regarding the customer gives us more transparency.“

Dietmar Wieber, head of organization and information technology

The first workshop showed that the sales-specific requirements as well as the needs of the service department can be met to a large extent by PiSA sales standard functionalities. The customizing was limited to few modifications of attributes and the functional range. Customer-specific sales- and service-workflows were defined by the AKS administrators themselves by using the integrated process management. The existing data of approx. 400 companies and more than 2.500 contacts as well as products and price lists were successfully transmitted to PiSA sales by the help of the comfortable import utility.

The PiSA sales *PSI/penta* interface was implemented at database level using interface tables (transport and confirmation table).

In February 2008, only three months after the project launch, AKS successively turned on all planned modules like the contact management, marketing campaigns, quote management and product configuration including the desired customization. The roll-out was accompanied by well-aimed key and end-user training. In autumn 2008 AKS is going to launch the PiSA sales service module.

Results Achieved

Due to the central administration of addresses and customer data all divisions at Alfing Kessler Sondermaschinen can now access up-to-date information. A common knowledge base was realized successfully by the help of PiSA sales. The complete documentation of all activities and correspondences regarding customer relations provides more transparency. The unique duplicate check of PiSA sales is already working when new contact data are acquired. Therefore data administration efforts are reduced enormously. By using the integrated campaign management of PiSA sales the employees of the marketing department can prepare and evaluate events more effectively. Moreover the close office integration of PiSA sales assures high staff members' acceptance

When creating quotes the sales department of AKS benefits from the tailor-made product configurator for machining centers. In comparison to the previous Excel solution staff members can generate quotes faster and less error-prone. Technical preparation is not performed by hand any more, but directly in PiSA sales by selecting components from the neutral product catalog. To define

the catalog, all machines were transferred with their options from Excel to the PiSA sales product database. About 50 options per machine type can be selected or deselected individually. Changes in the configuration automatically lead to a new calculation of the quote. This way staff members always keep

an eye on the current quoted price. If the quote is worked out, the required quote documents (e.g. price sheet, technical description) can be generated directly from PiSA sales by a mouse click. The required text modules are stored within the CRM database in several languages and can be centrally maintained.

Using the interface between PiSA sales and the ERP system *PSI/penta* AKS can maintain the complete customer data stock in only one system. Another advantage of the interface is that matched customer data for correct order processing and billing in the ERP system are always available.

Activating the service module, the service department of the machine builder will also operate with the PiSA sales solution. The integrated service management allows to enter service calls in detail (e.g. including trouble area and trouble type), to retrieve current customer installation data (as soon as a machine is delivered, the system automatically creates a machine chart) and to create service orders. Controlling benefits from ad-hoc reports and analyses, which are already available in the PiSA sales standard. (e.g. report on the number of service calls per customer or machine)

In the next step of the CRM project AKS is going to integrate his subsidiaries in the USA. Connecting the CRM system with the ERP system SAP-One the sales management in Aalen will be able to monitor sales and service activities of his partners and synchronize contacts, activities, service calls or service orders from SAP-One to PiSA sales.

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