

# Breath of fresh air in customer relations at Elektror airsystems with CRM by PiSA sales

case study

**The leading international supplier of heavy-duty industrial fans and side channel blowers Elektror airsystems gmbh pursues a holistic CRM approach and banks on the CRM solution PiSA sales in the fields of marketing, sales and service.**

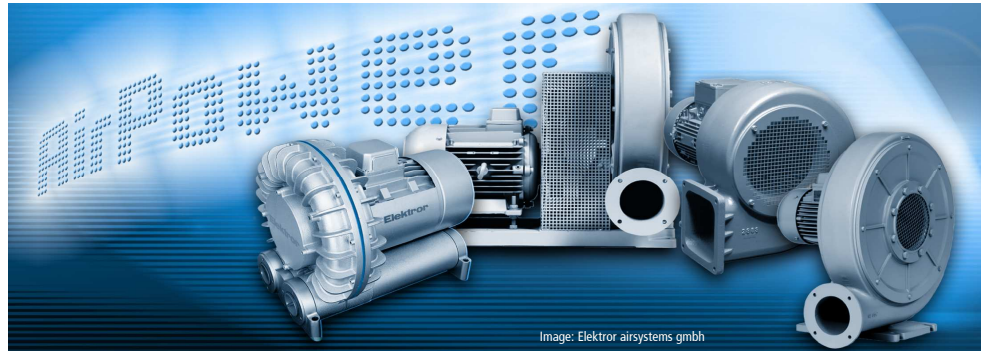


Image: Elektror airsystems gmbh

## Customer

Elektror airsystems gmbh

## Sector

Mechanical engineering,  
Manufacturer of heavy-duty industrial fans and side channel blowers

## Area of application

Contact management  
Technical sales  
Quote generation  
Marketing  
Service management  
Field service  
Competitor analysis

## Project data

Launch 05/2007  
In operation since 2/2008  
PiSA sales 4D  
Database  
SQL-Server 2005  
Deployment of application in a Citrix environment

## Integration

Interface to ERP system Infor  
Integration of MS Office applications  
Groupware MS Outlook

## Customer & Sector

The traditional engineering company Elektror airsystems gmbh was founded in 1923. Today Elektror employs about 230 employees at the headquarters in Ostfildern and at the industrial center in Waghäusel. The company maintains over 30 sales and service offices worldwide.

Due to the comprehensive application possibilities of air Elektror as a manufacturer of heavy-duty industrial fans and side channel blowers, the company does business in almost every sector of the industry.

## Initial Situation & Challenge

Between the poles of saturated markets and globalization and after having successfully completed reorganization in 2007, Elektror decided to fill the ideas of customer orientation, customer satisfaction and customer loyalty with more life by applying a process-oriented, integrative and holistic CRM solution. Elektror launched the internal project "elektror\_relationship management", briefly e\_rm. Customer relations should be improved and developed over the long-term especially by improved internal communication between departments, as well as by implementation of unified, repeatable and secure processes.

During the process of selection the firm figured that this goal could only be achieved by applying a holistic 360-degree CRM model which integrates all involved users seamlessly. Be-

sides classical CRM features, such as contact and activity management, the new system should support processes in marketing, technical sales (quote generation and calculation) and service. Therefore a close coupling of the software to the ERP system Infor:Com was scheduled. Access of field staff and back office employees to current company data should be designed as flexible as possible by deploying the application in a Citrix environment. Additional goals stated by Elektror were:

- + Unified information platform concerning customers and competitors
- + Planning of all sales activities on the basis of accurate customer segmentation
- + Deployment of key figures, as well as customer and product-related reports via mouse click
- + Transparent and structured quote overview and pursuit of quotes for sales managers and CEO's
- + Consistent execution of one-to-one marketing (individual customer approach)
- + Usage of market research data integrating internal and external sources
- + Capturing of competitor profiles in CRM
- + Automation of marketing activities
- + Systematic analyses of response and campaign success
- + Significant reduction of cycle time of service incidents by centralization of information and process standardization

## Project Course & Solution

In May 2007 the decision for the CRM solution PiSA sales was made. Standard functions ideally suited for technical sales accompanied by adaptable technology of PiSA sales finally convinced Elektror. After the kickoff and installing a test environment at Elektror, the contact management, sales, marketing and service modules were implemented step by step within the internal project "e\_rm".

"PiSA sales is highly attractive to us: It provides a high level of standard functionality for technical sales as well as efficient adaptation possibilities for future tasks. A wraparound view of our customers becomes reality!"

Jörg Lange, IT Manager

Part of Elektror's requirements was to integrate the CRM solution which acts as master for all contact master data (prospects, customers ...) in the existing IT infrastructure. Consequently the PiSA sales engineers implemented interfaces to the ERP system. As a result Elektror's sales employees can create quotes in PiSA sales and transfer them to the ERP system via mouse click. Selection of quote items and creation of quote documents is made in the ERP system. After completion all quote data are retransferred to the CRM system in order to record customer history gaplessly. Neutral data exchange between both systems is executed via neutral synchronization tables which can be easily extended.

Elektror's strong service orientation (proactive service, modernization of facilities, comprehensive spare parts business) required complete description of after-sales processes in the CRM system. This requirement could be met only with minimal customizing, because PiSA sales provides all needed objects, such as service call, service quote, service order and display of products installed at the customer incl. service data, already in its standard version. With the aid of PiSA sales Elektror's service employees are now able to capture enquiries, to evaluate facilities installed at the customer, to create service quotes incl. spare parts items and to process service orders in one system. The close connection and convertability of all service data achieves fast and effective processing of enquiries. After transferring service orders to the ERP system, important data of delivered and installed products are returned to the CRM system and linked with the customer. That way Elektror's service employees are granted extended access to products installed at the customer, including service relevant additional information, for instance serial numbers, period of warranty or maintenance intervals. To react more quickly and competently when processing service incidents, it is

planned to capture facilities and bills of materials of installed products from the ERP system and display them in CRM.

After the go live of the total system in February 2008, Elektror und PiSA sales decided to integrate together a competitor database in a next project step, because sales and service depend on current and detailed market information. The module was specified together, extensively tested by Elektror and finally implemented by PiSA sales. Since implementation, Elektror's employees benefit from an additional advantage: access to high-quality competitor profiles and product data. In operational business they are thus able to submit alternative quotes to their customers – especially for replacement, reconstruction or modernizing of facilities – and are always one step ahead of their competitors.

## Results Achieved

"PiSA sales strengthens our sales by optimizing the flow of information, it improves outward orientation of the back office and ensures a constantly high level of quote and consulting quality in sales and service", explains Aleksandra Ljubinkovic, who supervised the CRM project as Marketing Manager. Currently there are more than 50 employees working with the system. The main CRM benefit for Elektror is reflected in many areas:

- + 360-degree access to current, centrally managed customer, product and market data increases quality of consulting and quotes
- + Uniformly defined, repeatable business processes, which are accepted and understood by every employee, achieve high employee acceptance and reduce process costs
- + Applying the PiSA sales competitor database generates competitive advantages in sales and reduces expenses in market research
- + Service cycle time was reduced
- + Complete integration in Elektror's IT environment (ERP interface, close Office connection) helps to avoid media disruptions and thus decreases processing expenses

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