

CRM-ERP Link via Web Services – An effective solution for technical sales operations

case study

At Hübner GmbH, processes and products – be they vehicle articulation systems or gangway systems for buses and trains – are a complex and dynamic matter given that theirs is a system-selling business. Hübner GmbH uses PiSA sales, the project-oriented CRM solution, to effectively control all sales processes and it has utilized web-service technology to establish a close link-up to its existing ifax.OPEN ERP landscape. Both the sales and IT departments profit from this solution.



Customer

Hübner GmbH

Sector

Automotive

Area of application

Contact management
Marketing
Technical sales
Contract management

Project data

In operation since 2005
PiSA sales 4D
PiSA sales portal for web-based access to CRM data
Oracle data base

Integration

Interface to ifax.OPEN ERP system
Integration of MS Office applications
Integration of Novell GroupWise

Customer & Sector

Hübner GmbH is an internationally operating enterprise in the plastics and metal-processing industry. Headquartered in Kassel, Germany, the company employs a workforce of around 1,300 employees on almost all continents. Its successful positioning on the world market is founded on more than 50 years of continued systematic growth. As a medium-size enterprise steeped in tradition, Hübner provides customer-oriented solutions predominantly to the automotive industry. It manufactures products such as folding bellows, vehicle articulation systems, and gangway systems for rail vehicles.

Initial Situation & Challenge

It was necessary to perform an end-to-end analysis of all sales processes to attain a thorough overview of the core processes involved in this international enterprise. This was a challenge which, given the traditionally evolved, heterogeneous system landscape at Hübner GmbH, would not have been possible without integrative system support. "What we needed," says Christoph Heuser, Hübner's CRM appointee and head of sales, "was a centralized overview of the contacts, activities, and all the information contained in quotes and con-

tract orders. Which is why we decided to supplement our ERP software with a suitable CRM component." Since redundant data maintenance in both systems would cause a project aimed at enhancing efficiency to fail over the long term, it was imperative to establish a link between the CRM data and the data stocks contained in the company's ERP system. Hübner has been using ifax.OPEN, an industry-specific ERP solution, for years now. The company wanted CRM support that could be flexibly adapted to changes in the workflow of the sales department on the one hand and that would, on the other, manage information sharing with the ERP solution openly enough to prevent such changes resulting in any substantial additional effort in terms of interface maintenance. The ERP provider, ifax, was quick to respond and entered cooperation with the Berlin-based specialized CRM provider PiSA sales. The PiSA sales project-oriented CRM solution puts all functionalities for technically oriented sales operations at the company's disposal, it offers a high degree of adaptability, and it is able to establish the required interface as a web service. This innovative technology enables the interface to be developed and operated independent of platforms, operating systems, and programming languages.

Project Course & Solution

When the project plan for the introduction of PiSA sales was drawn up, emphasis was placed on proceeding on a phase-by-phase basis. The first phase defined the provision of information from the existing ERP system, i.e. information on customers (master data, delivery terms, etc.), open items, and head data from quotes – most notably to account managers in sales. An interface was specifically defined for the campaign-based execution of data exchanges in XML format.

The sales staff at Hübner currently uses PiSA sales to manage customer, employee, project, and quote data. In the process, the sales staff accesses a joint knowledge base which spans all

„Because PiSA sales maps out the entire quote-preparation phase in central sales-project folders, management remains constantly informed about the current status of sales activities. This solution will ideally facilitate our sales-management operations.“

Christoph Heuser, head of sales and head of the CRM project

operating areas. Thanks to close Office integration, emails and documents required for customer-communication activities are actually prepared in PiSA sales, which also forwards and stores them in the CRM system. All sales activities – such as tasks, appointments, correspondences, and quotes – are automatically linked to the customer and can be stored in central sales-project folders. The advantages for the sales department are:

- + Thorough documentation of all business incidents in the customer and project history
- + Quick and qualified information procurement for sales management
- + Improved overview through the integration of different data sources
- + High degree of system acceptance among employees through the direct incorporation of MS Office products into PiSA sales

Hübner also managed to define elaborate contract-management operations in PiSA sales (to enable the management of framework agreements with customers and general contracts with insurance companies and suppliers, for example). At Hübner GmbH, the process of contract preparation, managed by sales, involves a number of specialized departments, e.g. the legal department, design, and documentation. It was therefore necessary to combine all information, documents, and activities – everything from drafting to review and contract release – into projects. For this purpose, it was possible to couple the contract module

contained in the standard version of PiSA sales with other PiSA sales elements and thus to accommodate the majority of this customer's requirements from the outset:

- + Definition of contract structures
- + Transfer of tasks to specialized departments, including indicators on the processing status
- + Review of the processing status of all tasks by the head of sales, including automatic notification in the event of failure to meet a planned deadline
- + Contract- and document-release mechanisms
- + Contract monitoring through automatic allocation of a follow-up review date prior to contract expiration or expiration of the period for issuing notice of contract termination

“Global Project” stands for the web-based connection of Hübner sites located around the globe to a central information pool. This sub-project was launched in the 3rd quarter of 2007. Once completed, it will provide Hübner employees in the U.S.A., Brazil, or Russia access to the sales

information contained in PiSA sales. To enable this project to be realized, customer-specific adaptations were made to the PiSA sales web portal.

A planned additional phase will see utilization of the PiSA sales service module for Hübner's road and rail divisions. Office-based technical support staff will capture service calls and process service orders in PiSA sales and will be given access to a centrally maintained FAQ data base.

Results Achieved

The PiSA sales project-oriented CRM solution puts all functionalities for technically oriented sales operations at the company's disposal. Use of the CRM system substantially simplifies contact and project management at the company and creates a common knowledge base across all operating areas. What's more, the seamless integration of MS Office products and Novell GroupWise into the PiSA sales CRM solution has resulted in a particularly high level of acceptance among users of the system.

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