

Uhde High Pressure Technologies Puts on the Pressure. PiSA sales for CRM with customers and operators.

case study

For more than 75 years now, Uhde High Pressure Technologies GmbH has provided top performance to its customers in the areas of process development, design, and fabrication of high-pressure components and plants. Given the nature of the company's business, its sales and service processes involve extended planning and sales cycles as well as elaborate project-management work. Uhde looked to the PiSA sales CRM solution which provides a 360-degree perspective on the customer record to further enhance the support provided to its employees for the processing of business incidents.



Customer

Uhde High Pressure Technologies GmbH

Sector

Plant construction, manufacturer of high-pressure components and plants

Area of application

Management of customer and operator data, Campaign management, Service management

Project data

In operation since 2007
PiSA sales 4D
Data base: MS SQL server 2005

Integration

Interface to SAP R/3 ERP system
Integration of MS Office applications
MS Outlook groupware
CTI interface

Customer & Sector

Uhde High Pressure Technologies is a ThyssenKrupp Technologies company which has systematically and successfully asserted its position in this particular market segment since 1930. Its long years in business have put a wealth of experience and competence in the development and application of components and plants in a variety of sectors (including the chemicals and pharmaceuticals, the food, the textile, and the semiconductor industries) at its disposal. Close cooperation with universities and research institutes secures a high degree of potential in the areas of engineering, fabrication, and process-development know-how. Being a company with a long-standing tradition, Uhde High Pressure Technologies employs a workforce of around 200 employees which supply renowned licensors and customers around the world (the share of export is over 90 percent).

Initial Situation & Challenge

One of the key focuses of the support sought from a CRM system was the management of customer relations on the one hand and relations with the operator of the plants supplied

by Uhde on the other. It needed to be made possible to establish relationships between companies, contacts, projects, and machines, with activities simultaneously assignable to a machine, a company, or a contract order. Additional functions were to include, among other things, campaign management, schedule management, the transference of relevant emails into the CRM system, and the easy generation of correspondence from inside.

Uhde was also keen to have the system accommodated critical service factors such as the availability of replacement parts over years of plant operation. It was therefore important to converge the management of external and internal projects with complaints management. The company wanted service-relevant details pertaining to the plants and their history to be recorded in the system to enable rapid response to requirements for replacement parts, given that one of the stated goals of Uhde High Pressure Technologies was to reduce response times for the delivery of replacement parts and on-site services. It was important before this background, therefore, to take into account

that machines could be subject to relocation or reconfiguration (if, for example, a company were to change hands).

The CRM system needed to integrate the SAP R/3 ERP system used to support resource planning, since master data on accounts receivable and projects are maintained in that ERP system.

„All requirements were implemented very fast. Even technically complex issues such as those concerning SAP and CTI were quickly dealt with. At this juncture in the project, PiSA sales is satisfying our demand to the full extent. .“

Jürgen Reisberg, head of IT at Uhde High Pressure Technologies

Project Course & Solution

Following a brief phase of soliciting information and proposals in early 2007, Uhde High Pressure Technologies chose to introduce the PiSA sales CRM system to its operations. Subsequent to swift implementation of the company's initial adaptation demands, the CRM system was set up for this client on a demo computer located at the offices of PiSA sales and made available to Uhde via VPN access in the 2nd quarter of that year. This enabled comprehensive testing of the system for the purpose of optimizing it for the client.

When the system went live on the Uhde premises, it featured the newly developed PiSA sales 4D system version. To enable the company to make efficient use of the new CRM features in PiSA sales and to execute customizing without any loss in performance, the data-base system used by Uhde was migrated to the SQL server 2005.

The ERP link to the CRM system via an SAP interface secured reading access from PiSA sales to data from SAP. This allows the head data contained in proposals to be composed in PiSA sales and the contract-order data to be managed in SAP Master.

Development work on PiSA sales has been driven by an integrative approach for years – which is why the PiSA sales version 4D features a CTI (Computer Telephony Integration) interface. Uhde is one of the first clients to use this interface as a means of securing automated access to customer information during telephone contact.

For the handling of service processes, Uhde uses the PiSA sales service module which is adapted to the company's specific requirements. This module enables Uhde staff members to record service information such as complaints received directly in PiSA sales. Data on all components, machines, and plants has been fed

into the system to allow information on the condition of the products installed at customer sites to be reported. The staff at Uhde can refer to the PiSA sales FAQ data base to locate solutions in the case of a complaint. In the event that the processing of a complaint leads to a service order, this order can then be entered into the PiSA sales module and be processed.

The productive launch of PiSA sales 4D at Uhde will be accompanied by training users for the different modules. It is also important to note that the introduction of the CRM system has been met with strong acceptance by the

users. The next planned phase of this cooperation with Uhde is centered on optimizing and expanding the SAP interface.

Results Achieved

The PiSA sales contact-management function provides Uhde with a simple-to-use tool for the recording and management of contacts and organizational units of all kind. Automatic checking processes, such as the duplication check, ensure that there is no redundancy. One of the benefits for Uhde of this contact-management feature is the CTI link-up which enables phone calls to be initiated in PiSA sales at the press of a button and incoming calls to be immediately identified based on the phone number stored in the contact-management section of the CRM system. So Uhde employees are prepared for their phone contacts with customers and thus have a positive impact on customer relations and customer retention.

The CRM system contains details of the technical basis installed at a customer or operator site. Service objects in the CRM system are the machines set up at the customer sites. If they receive a complaint or a notice of disruption, Uhde employees can now retrieve product information which helps them to identify the required replacement parts. The integrated PiSA sales FAQ data base is the knowledge data base for service operations. Members of the service staff can now enter notes with their experiences in dealing with service incidents into the system and can then refer to this information to help them find solutions and analyze corrective measures before applying them. Customers and operators profit from the short response times and reduced down times.

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