

How i CRM: Bernecker + Rainer Industrie-Elektronik Counts on Sugar to Lift Sales and See Customer Life Cycle

INTRODUCTION

OWEN DAVIES, APPLICATIONS MAINTENANCE MANAGER OF B&R, WAS MORE THAN READY TO UPGRADE HIS CUSTOMER RELATIONSHIP MANAGEMENT PLATFORM AFTER FIVE YEARS OF WORKING WITH A PROPRIETARY LOTUS NOTES-BASED IMPLEMENTATION THAT HAD SERIOUS SHORTCOMINGS AND WAS OBSOLETE BY TECHNOLOGY STANDARDS.

He had a multitude of choices: SAP, Salesforce or a new development in Lotus Notes. The company was leaning toward a customized SAP-based platform – it had C-level support and was familiar because the company was using SAP on the financial side. But Owen knew the value strategy was in choosing a platform that provided agility and cost efficiency in the long term.

So committed was Owen that he went against the institutional viewpoint. Arguing agility, cost efficiency, user comfort and integration capabilities, Owen lobbied for Sugar Professional.

“I knew I was pushing back against a comfort level,” says Owen. “That meant I had to show a higher level of proof. Once we had a Sugar demonstration, I was convinced that Sugar was the most efficient way to achieve our goals and incorporate new functionality that the platform provided.”

Today, Sugar is the backbone of the sales team, a key element for marketing and a baseline resource for customer engagement in B&R’s offices throughout the world.

“We’re a leader in process technology, and Sugar helps us show that in a cost-efficient way that makes us look smart as we develop a coordinated sales approach and track the customer journey,” says Owen.

ABOUT BERNECKER + RAINER INDUSTRIE-ELEKTRONIK:

Description: As a manufacturer of automation technology, B&R specializes in controller, visualization and drive technologies for machine and system manufacturing. In addition to scalable solutions, B&R provides individual components and process control automation. The company operates more than 160 offices worldwide.

Headquarters:

Eggelsberg, Austria

Customers Include:

Krones, IMA Industries, Coesia Group, Sidel, and Korber Medipak

Founded: 1979

Website: www.br-automation.com

Partner: Provident CRM



CHALLENGE: Create a unified Customer Relationship Management system to serve more than 700 worldwide users; provide a 360-degree customer view; minimize implementation costs and achieve value in time-to-use implementation.

SOLUTION: Sugar Professional, hosted on-site

RESULTS: Faster time to market with a highly customizable CRM

- Unified opportunity management and quote processes across global teams
- Consistent customer-facing identity
- Improved internal and external communications
- Expanded reporting; more than 30 customized reports for day-to-day operations and executive management
- Enhanced inventory tracking

CHOOSING THE CRM WITH THE HIGHEST DIVIDEND

Like many growing companies, B&R tried as long as possible to live economically within its in-house Lotus Notes-based CRM, knowing it would be costly and risky to change, and that any change would get pushback from internal teams.

But change had to occur if B&R were going to maximize lifts in sales and net margins. Internally, everyone knew increased efficiency, process automation and outstanding customer service were keys to profitability.

The approach – the implementation that would help reach those goals – remained at issue.

“We had decided to build our own system in SAP and then somebody said we should look at Sugar. We looked at it for about an hour in a web conference and decided to throw out our plans. It was clear that Sugar could fulfill our goals and give us more than we had anticipated,” says Owen, who today oversees big CRM changes while his team focuses on the smaller daily adjustments.

“Being in a web browser and appearing to be user friendly was very impressive and offered more flexibility,” Owen adds.

RAPID AND COMFORTABLE IMPLEMENTATION

Transitioning from legacy systems to any CRM can be bug-plagued and a difficult sell, especially to a sales team whose focus is more on generating revenue than inputting data about customers.

B&R resolved those challenges with a three-month beta program.

“We ran the old system and Sugar side-by-side. Everybody saw quickly how effective Sugar was going to be, and that made the transition a lot easier,” says Owen. “We had about 600 users at that point – we’re about 700 now – and it was a fast, seamless transition once everybody, including sales, saw what Sugar could do for them.”

Three months after the kick-off, Sugar was up and running.

“It was clear that Sugar could fulfill our goals and give us more than we had anticipated.”

Owen Davies, Applications Maintenance Manager

“We simply know our customers better because of Sugar.”

Herbert Groemer, CRM Administrator

SUGAR MAPS THE CUSTOMER JOURNEY

With buy-in from mission-critical teams, such as sales and marketing, Owen could show Sugar's ability to lift customer satisfaction levels.

He knew others business teams, such as finance and administration, had to be involved, but the corporate truisms were universally valid: sales pays the bills and customers come first.

With 100 percent use worldwide in sales, B&R's sales implementation is the pivot point that helps the company chronicle the entire customer journey.

"Sugar gives us the ability to be customer-specific in our solutions; no matter who is responding to the inquiry, we know the customer and the needs," says Owen. "That makes us look smart and personalizes our customer service."

Using five stages of the sales process -- what B&R knows about a company, who the contacts are, how the product can be presented, what the production needs are and the up-sell and service opportunities -- B&R uses Sugar to chart the entire customer life cycle.

"We never had this kind of consolidated information before. It used to be in personal notes and spreadsheets not everyone saw," says Owen. Now, it is in one place in Sugar, and everybody understands how to see and respond to the customer."

Herbert Groemer, who handles the daily CRM administration, says customers see a difference in the B&R business model today because Sugar helps produce laser-focused proposals that are unique to customer needs.

"We simply know our customers better because of Sugar, and our sales and marketing teams are more involved with the customer at a personalized level," says Herbert.

A SWEET LOOK AHEAD

Now that B&R is seeing the returns from Sugar, Owen and Herbert know the internal sell on growing Sugar use will be significantly easier.

They are looking to add more marketing functionality, increase customized reports and leverage Sugar's user-friendly adaptability to handle processes in finance and administration.

"The Sugar vocabulary is so comfortable for us now that we see all kinds of uses," says Owen.

"Being in a web browser and appearing to be user friendly was very impressive and offered more flexibility."

**Owen Davies, Applications
Maintenance Manager**

PARTNER



B&R's customized Sugar deployment was developed and implemented, and is managed by, Advanced Partner Provident CRM, which specializes in business process improvement tools and systems integrations. The company maintains offices in Dublin, Ireland; Manchester, England; Munich, Germany, and Vienna, Austria.

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CUSTOMIZATIONS AND INTEGRATIONS

INTEGRATIONS	CUSTOMIZATIONS
<ul style="list-style-type: none">• SAP: financial tracking and forecasting, customer service tickets, all feeding into Sugar• IBM Lotus Notes: internal and external communications• Evalanche: marketing automation• Camos as Product & Proposal Configurator	<ul style="list-style-type: none">• German and English website functionality• Opportunities Module: Has sub-module called “Qualification System” that that tracks customer status• Inventory Module: Created to track status of manufactured devices, including release dates, price and warranties• Campaigns Module: Monitors events being organized by offices worldwide, including trade shows• Replies Module: Charts responses to invitations to events• Authorization and Territory Management as well as custom Reporting (KReporter)

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