# proaxia

# Innovative products – first-class sales processes

SAP® Hybris® Cloud for Sales at Weiss Technik

## Who are Weiss Technik

Weiss Technik is one of the leading manufacturers of equipment in environmental simulation, stability testing and emission testing. Their product range includes testing systems for simulated exposure to temperature, climate, weathering, temperature shock and corrosion as well as long-term testing for test chambers of all sizes. Walk-in chambers and process-integrated equipment for environmental simulation are designed, produced and installed according to our customers' requirements..

### Excellent sales support through a standardized CRM and mobile devices

As an international company with discerning clients in the capital goods market, Weiss Technik places great importance on fine-tuning its sales processes and continuously improving them. With its sometimes highly complex projects, close contact with customers and in-depth consulting is required from lead to order confirmation. This means that highly coordinated and transparent sales processes are paramount, as well as knowledge of all business information concerning the client which might be relevant for the sales process.

To support the sales organization in the best possible way, Weiss Technik decided to introduce the CRM system SAP Hybris Cloud for Sales.

The project was carried out within 9 months in collaboration with proaxia, and 200 sales employees in Germany are now working with the new system.

# CRM implementation at Weiss Technik with proaxia and SAP

## Interview with Daniel Pfeifer, project manager at Weiss Technik

In this interview, Daniel Pfeifer, investment controller at Weiss Technik and the project manager responsible for the introduction of SAP Hybris Cloud for Sales, talks about the significance of the CRM project for his company. He provides insights into challenges, goals and experiences during the implementation.

### *Mr. Pfeifer, what are the main characteristics of the sales process at Weiss Technik?*

Weiss Technik sells standard products and complex equipment designed specifically for the needs of the clients. This requires a great deal of consultation. A sales project can take up to a year and occupy a team of 5-10 staff members from sales, technology, project management, service, and various committees. Different departments need to pool their efforts. This is why it is essential for us that all processes work smoothly.

Another aspect is that our salespeople spend most of their time visiting customers. They need a mobile solution providing access to current customer data at all times.

> «A sales project can take up to a year and keep a team of 5-10 occupied. That's why it is essential for us that all processes work smoothly.»

### *What are your customers' expectations?*

Our customers are well informed. They know the market and they are not looking for just a product, but a solution. Most of them are involved in their company's quality management. They must comply with standards and, above all, make solutions available worldwide – with consistent and reliable quality.

This means that having just one regular supplier is no longer sufficient. What they need is a partner with whom they can achieve their business goals in the long term. We are therefore keen to show that our type of solution, which includes service and maintenance, helps our customers reach their goals.

### *How important is a long-term customer relationship to your business?*

Our relationship with our customers is very important. In the course of a project maintain frequent contact with our customers, and with various members of their staff. It is important to be seen as a competent partner on all levels.

Moreover, customer loyalty is paramount for us so that we can also win over other areas of the customer's business. What distinguishes us from our competitors is that we can handle quick and easy projects as well as highly complex and consultation-based ones.

### *On what basis did you start the project? What did the IT landscape and organizational conditions look like?*

We do business in the capital goods market, selling complex and consultation-intensive products. For our sales this means having to combine both technological expertise and excellent sales skills. Previously we didn't have a CRM tool that could support this work adequately.

Moreover, our group has four companies servicing different industry sectors with different products. Both sales processes and IT systems have developed heterogeneously over the years. One WEISS company was already working with a CRM tool, while the others still relied on paperwork to some extent.

Our common basis was the SAP ECC system used by every WEISS company, but in different ways. Our overriding goal was to harmonize the processes, develop standardized approaches and implement an integrated CRM system.

> «We do business in the capital goods market, selling complex and consultation-intensive products. We need a standardized approach and an integrated CRM system»

### What specifically do you aim to achieve by introducing a CRM system?

We want to improve our customer orientation and increase market transparency. Our goal is to obtain a complete overview of our customers across the various business areas. There has always been transparency in every area, but we would like to create an integrated customer database that can be used by the sales organizations in Germany and also by the service organization and the companies in future. In this way we can use synergies and control our sales processes systematically and efficiently.

> «We want to improve our customer orientation and increase market transparency. Our goal is to obtain a complete overview of our customers.»

### Where, in particular, can you see potential for improvement?

I see potential in reporting and in sales control. For this, we need uniform access to consistent data. So far, we have had different types of reports from the SAP ECC system and Excel reports, but no consistent reporting from a single sales system.

I also see potential in providing mobile support for our sales team. Our sales force is constantly on the road seeing customers. To increase efficiency and support customer proximity, we need mobile access to the essential customer data.

Another aspect is lead processing. We didn't have a standard tool for saving and tracking customer details from events and online inquiries. This, however, is an essential requirement if we want to improve our marketing processes.

### Do you also envisage integrating the service organization in order to obtain a complete overview of your customers?

Integration with the service organization is certainly another important lever for the future. The CRM project has been a first step in this direction. Using the CRM system, our sales force can access basic data such as service interventions. We are planning to extend this. At the moment, our service cannot access the data from the CRM system. Given the various systems involved, integration is rather complex.

### In planning the implementation of the CRM system you opted for SAP as the technology partner and proaxia as the consultancy partner. Why?

We have chosen SAP® Hybris Cloud for Sales as the application, because it is important for us that the sales-force can access current customer data when they are out and about. We have introduced mobile end devices. Accordingly, having mobile access to the CRM via an app was important to us. Our field staff also work in places or buildings where no network connection is available. This is why offline availability of the system was an important requirement. The SAP solution is a good choice for this. Besides, we already work with SAP-ECC.

> «With the SAP Cloud solution we are confident that we are implementing a standard which we can also roll out to our companies.»

With the SAP Cloud solution, we are confident that we are implementing a standard which we can also roll out in our companies. Working with proaxia had proved to be a good experience for our company in the past. That's why proaxia also quickly became a potential partner, in the event that we opted for SAP.

At Weiss Technik, we didn't have any experience with Cloud systems. So it was of course important to find competent consultants who were familiar with the solution and could quickly understand our processes. proaxia and SAP have close ties; the companies worked together to present us with a transparent project approach. These were definitely good reasons for our decision.

*Which Solution Features are included in the CRM solution that you have implemented at Weiss Technik?*
- SAP® •SAP® Hybris® Cloud for Sales, as CRM solution
- Mobile offline app by SAP for accessing the CRM from mobile devices
- Integration into onPremise SAP ECC with SAP® HANA® Cloud Integration (HCI)
- Customer-specific extensions using SAP Cloud Application Studio
- Integration with SAP® Jam™ (collaboration)
- Integration with E-Books (file archiving system)
- Integration with the service solution (overview of service assignments)
- Integration with the email system (Lotus Notes)

*Which processes does the solution support and what was of particular relevance in this context?*
With all processes, of course, the issue is to reduce effort, to standardize and establish consistency – in short, to make sure that the systems provide optimum support for the workflows.

**Account Management with full customer perspective**
A particularly important aspect for us is enabling sales-people to access customer data on their own. Previously, they had to ask somebody to send them the data or have it printed out. Now they can access the customer information directly and independently using mobile devices.

**Marketing, leads, and campaignsn**
Since we have been using the system, we have been able to adopt a consistent approach to marketing and leads. Previously, contact details collected during events and online from potential customers had not been documented in a central place. We didn't have a tool to do this. It's great with our CRM, of course, because all contacts are now saved as leads in the central system. Lead processing becomes more rigorous because we can see at a glance what remains to be done.

«The more our staff familiarize themselves with the new processes, the more transparent the activities with our customers become. The system gives us the opportunity to view our customers across all business areas.»

The system gives us the opportunity to view our customers across all business areas. We have not yet established consistent marketing processes, but we learn more every day and have lots of ideas on how we can use this basis for improving customer communication.

**Opportunity Management**
The CRM system automatically forwards qualified leads to opportunity management where members of the sales force can proceed to deal with them.

**Preparation of tenders and orders**
In the course of a sales project, we collect all information in the CRM system and generate a draft order that is further processed in SAP ECC.

**Sales reporting**
Wir halten die Daten jetzt anders und können sie viel We now manage our data differently and can evaluate it in a much more differentiated way. This enables us to set up a consistent reporting system. At the moment, we are working with the management to define the necessary evaluations.

**Management of customer communication (email, appointments, visit planning)**
The integration with the email system is another aspect that helps to keep all customer data in a central place and gives us a full overview of customers. The email communication with the customer needs to be saved quickly in the CRM system. We use the Lotus Notes add-in to establish the link and copy the emails directly to the CRM system.

**Collaboration, Document Management and Knowledge Management**
We are planning to establish SAP Jam as an alternative to the internal Wiki systems in the sales organization. Currently we are using it for knowledge management, for making data available. The sales force in the field uses the app to find all kinds of everyday tools such as brochures, production lists and CRM training documents. We also use the forums for posting new information.

Furthermore, we are currently trying to find out if we can use SAP Jam to integrate our agents (freelance distribution partners) worldwide for exchanging information and supporting collaboration.

We introduced SAP add-in E-Books a year ago as a compulsory, comprehensive filing system for all sales-related data. All important communication, sketches and offer calculations can now be found in the "E-Mappe" within SAP. The *E-Mappe" is particularly important for the in-house sales force. Staff members who do not have access to the CRM system can also access it. The CRM system also contains sales-related data, but especially the data relevant for the sales force in the field and which they need when at the customer's premises. We have interfaces allowing transfer of information from the CRM system to the E-Books but not yet vice versa, i.e. from E-Books to the CRM system. What we now need is an even better interface to avoid redundant filing systems and to keep the processes lean.

# User experience and recommendations

*Mr. Pfeifer, within 9 months the CRM system was implemented and 200 members of the sales force have been actively working with it since September 2015. Are you able yet to give your first impressions of its usefulness?*
Overall, we have successfully implemented the system. The feedback we are getting is extremely positive. We have not yet identified hard KPIs, but many "soft" successes have been achieved.

It is difficult to measure this precisely, of course. Process analyses are under way. We can see clear benefits with the leads. The comprehensive database makes for much better analyses. Time spent searching has decreased considerably.

We now also use the system at trade fairs and register leads on it directly, which has enabled us to reduce the post-processing effort considerably. We have become more efficient and our staff have more time for other tasks.

*You have introduced a comprehensive CRM system for four business areas. It must have been a challenge to achieve cross-organizational agreement. What was your approach?*
Indeed, it was a great challenge to introduce one common system in four different sales organizations in Germany. It was a compromise, with the organizations of each area having to adapt in one way or another.

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We could not achieve a 100% solution for every area, but that had not been the goal anyway. Our top priority was to remain close-to-standard. Of course, in-house development would have been an option for many features. But this was precisely what we wanted to avoid. We are planning to roll the system out worldwide. For this reason, we did not want any peculiar features that would have made this difficult for us.

*What is your approach to master data? This is certainly a challenge in a heterogeneously grown business.*
Yes, it is a big issue for us and likely to become even more of a challenge with the worldwide roll-out. We use an SAP ECC system, but the data has not been collected in a completely uniform manner in the various business areas. This has led to double entries, among other problems. We have not yet implemented a customer hierarchy, either. Without this, the activities related to a company group cannot be made readily transparent. This is why we could not copy the data directly into the CRM system.

In the course of the CRM project we analyzed and evaluated the issue of master data cleansing. We found that data cleansing would have been more costly than the project itself. We therefore decided to take a pragmatic approach, by transferring only a part of the data selected by certain filter criteria to the CRM system.

It goes without saying that we now need to continuously improve data quality. This is an important issue that will keep us busy.

### What about Change Management – how did the staff take to working with the new system? How did you prepare the team for the new processes?

Over the past few years we haven't introduced many new systems or processes in sales. For this reason, some people have found it quite a challenge to adapt. People are afraid of change. After all, every change involves an initial learning curve in which things do not go smoothly and take a little more time.

This is why we started communicating about the change very early. People knew about the planned change and understood that a company of our size needed a sales system. In addition to the four-people strong project team, people from other areas were involved as part of the extended project team. They became familiar with the system and the user interface before the launch and were therefore able to transfer their expertise to their departments. Intensive training sessions were also held. Follow-up training sessions are still under way. This has been a successful process.

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*«Of course, Change Management can never be profound enough and you can never start it early enough.»*

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Yet, of course, Change Management can never be profound enough and you can never start it early enough. This applies even more to a medium-sized company which has not yet undergone much restructuring.

### Did you encounter any particular technical challenges?

For the integration of the SAP ECC system and the new CRM system, we are using SAP HANA Cloud Integration (HCI). A big challenge was that our IT meets very high security standards. This presented some challenges during Cloud integration when it came to establishing which door needs to be opened, and where, so that the data can be transferred from A to B. This is a big interface which still requires a considerable amount of resources if, for instance, the centralized IT department modifies privacy practices.

### The Cloud application entails new releases and updates every three months. What are the implications for the current operations?

This was always going to be an extremely critical issue for us. The IT department must learn to adapt to it. With the SAP ECC system, you could go for years without any changes being needed. With our CRM system, however, something or other changes every three months. This requires resources and planning, and people need to accept that things are constantly changing
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*«Once the basic functions are working properly and everything is up and running, changes at regular intervals may turn out to be a good thing as this forces us to remain flexible.»*

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Our IT department, in particular, considers the three-monthly release cycles to be a very critical issue. We would prefer the cycles to be longer, with fewer new functionalities, as this would provide more stability. Once the basic functions are working properly and everything is up and running, changes at regular intervals may turn out to be a good thing as this forces us to remain flexible.

We would like to find ourselves quickly at the stage where we, Weiss and proaxia, can together focus our efforts on expanding and further developing the system. After all, what matters is the process. If it works smoothly, all members of the sales force, in-house and in the field, can work well and are happy.

### Were there any critical phases during the project, and do you have any recommendations?

We have found many good solutions. We also have overcome most obstacles. This required a specific and clearly defined project plan and a great deal of consistency in the implementation. We were highly proactive and carried out a lean project. proaxia has supported us well throughout the process. It does not make sense to discuss things over and over. You need to take decisions and follow them through. Eventually you can no longer allow alternatives, especially when old systems exist. It is important to deactivate those old systems according to a strict plan. All loopholes allowing access to well-established former processes must be closed.

«We have found many good solutions. This required a specific and clearly defined project plan and a great deal of consistency in the implementation.»

«We have a very special IT landscape. – A consultant therefore needs to have a solid basic knowledge and be able to understand our processes quickly. proaxia helped us to become fit and is still providing us with continued follow-up support.»

Resources are certainly critical to a project's success. In the course of the project we faced some obstacles because we sometimes needed people who were not members of our team and were tied up on other projects. It was all the more important for us to keep our small project team completely free from everyday business, like a task force. In this way, we could focus entirely on the project during the peak phase.

*How did you find working with proaxia?*
We are a very special company. We manufacture highly specialized products. We have a very special IT landscape. A consultant therefore needs to have a solid basic knowledge and be able to understand our processes quickly. I also expect consultants to actively point out risks and make specific suggestions for addressing them. Consultants should be proactive as well as reactive. This is how we found proaxia to be.

We did not have much Cloud experience at Weiss and could not discuss on equal terms. A great deal of knowledge transfer was needed and proaxia quickly found common ground with our staff, steadily pushing the project forward. proaxia helped us to become fit and is still providing us with continued follow-up support. We remain in close touch with them and approach our contacts there at regular intervals, because issues arise every now and then where we need help. It is of course unsatisfactory for us to have a system that we cannot fully maintain ourselves.
Our cooperative relationship with proaxia, and the sincere, open and efficient way in which it is conducted, is therefore all the more important.

I hope we can continue working together on future projects.

## SAP Hybris Cloud for Sales

Cooperation & Social Media

Account Management with full customer

Marketing

Productivity and customization

Oportunity Management & sales

Real-Time Analytics

E-mail and calendar integration

Integration with SAP ERP, SAP CRM, SAP JAM, Inside View etc.

Monbile app with offline functionality

# proaxia
## value delivered as promised

## About proaxia consulting group ag

proaxia consulting group ag is an international management consultancy firm headquartered in Switzerland and with branches in Europe and Asia. With more than 170 consultants in German-speaking countries, Poland, China, Japan, Singapore and Indonesia, the company guarantees superior solutions and service plans as well as follow-up support, in every case to the highest quality standards.

proaxia specializes in distribution and service processes and supporting spare parts logistics processes in the automotive and discrete manufacturing industries.



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