

Success Stories: ABB Automation Technologies



High-quality data – a must for ABB Automation Technologies

Caesar CRM is the hub of sales, and thanks to an automatic link-up to the corporate database “Kundskap” (customer information) basic details such as addresses and credit ratings are always up-to-date.

Background

Many companies within the ABB group of companies have been using **Caesar CRM** since the mid 1990s.

The organisation is spread across many cities and towns up and down Sweden. Sales personnel, engineers and customer support personnel all work together with the same customer, and must have access to relevant information about that customer.

The Challenge

Already in the era of mainframes, ABB had all its customers in one system. When the PC became the salesperson's tool, it became necessary to introduce a common approach to

customers and build a structure for ensuring that customer details were updated and correct.

It's obvious that all systems that contain customers should be linked together. Manually trying to maintain the same information in several places just isn't feasible. Sales personnel should not need to put time and effort into entering and updating basic details, information that can easily be purchased and is updated constantly. Just simply keeping track of double entries easily becomes a huge job if everyone can add new customers.

The Solution

All **Caesar CRM** installations subscribe to customer details from the common customer database Kundskap, and are linked together by a unique customer number.

The information from Kundskap is available in **Caesar CRM**, but can only be read, not changed. Instead, Kundskap is linked to several external address sources which ensure that the information is up-to-date. Each night, details of addresses, numbers of employees, turnover and credit rating are tanked into **Caesar CRM**.

Credit rating has become an increasingly important factor in conjunction with the introduction of SOX. It's about minimizing risk. A decision has been made not to do busi-



“It's important that users feel that they are getting more out of a system than they are putting in”, says Urban Bokén at ABB Automation Technologies.

ness with customers who have a lower credit rating than a certain level. Because the customer's status is shown directly in the main view, it is easier for sales personnel to work only with the right customers.

In **Caesar CRM** you save information about customer visits, deals and offers, including documents such as basic decision data and calculations. Sales personnel can also view imported sales history. It's important that the system is simple and easy to comprehend. Both ISO and SOX have requirements in relation to traceability and the correctness of the information.

Customer visits are an important part of the business relationship, and in accordance with the motto "what gets measured gets done", the company is monitoring how many visits are made and to which customers. Deals in the pipeline are registered with both the probability of a deal being closed, and the probability of ABB closing the deal. An estimate of how many project and engineer hours are needed is also registered. **Caesar CRM** thus becomes the key to effective forecasting, both for pipeline and weighted sales, and for planning the manning of projects. ABB insources and outsources engineers according to need, and so it is useful to know estimated manning levels for the next few months.

"Sometimes it's a challenge to ensure that the relevant information is actually registered, but that's an important part of my coaching as sales manager. I follow up on both anticipated sales and what's planned in **Caesar CRM** for the near future," says Urban Bokén.

ABB has begun transferring from **Caesar Business** to **Caesar webCRM**. Most people have 3G cards and already have access to **Caesar webCRM**. Urban Bokén has noted an increase in activity among users who have started using **Caesar webCRM**. It's important that users feel that they



Advanced pumps

are getting more out of a system than they are putting in. Right from the homepage, they get a good overview of what they need to do, with outstanding deals and contracts that are about to expire.

It's become more common for sales personnel to make notes directly in **Caesar CRM** during a customer visit. Initially, customers were a bit doubtful about this, but when they received a visit report via e-mail directly after the meeting containing everything that had been agreed, customers also began to see the benefit and instead became more positive to the idea.

ABB is now looking into using **Caesar GoTo** to link **Caesar CRM** with other systems for viewing unpaid invoices and delays in deliveries – all to help sales personnel be prepared when they meet the customer.

Effects

Caesar CRM has had an impact at many levels:

1. Low TCO

Thanks to a central installation, administration is easy and efficient. With the transfer to **Caesar webCRM** it will no longer be necessary to install any software on the clients and users can be much more efficient in their usage.

2. High-quality data and a common picture of the customer

In the corporate database Kundskap each customer has a unique ID. Core information is updated automatically from external sources. By subscribing to the customer, you ensure that everyone has the most up-to-date information. Users cannot add new customers themselves, which eliminates the risk of duplication.

3. Great support for sales personnel

Caesar CRM helps sales personnel to plan activities in relation to customers. They get a lot of information without effort and can thus act professionally and efficiently.

4. Great support for sales and company management

All the information on what's happening with customers is found in **Caesar CRM**. This makes it easy for management to see what's going on in different parts of the country and to monitor activity and results.

In a nutshell

- All important information about customers is gathered in one place, with automatic updates from external sources.



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SuperOffice Business Solutions develops, sells and implements Caesar CRM, and is a part of the SuperOffice Group. For more information about **SuperOffice Caesar CRM**: caesarforum@superoffice.se.