

CRM Case Study- GEMÜ

In a systematic way for effective customer management

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GEMÜ Gebr. Müller Apparatebau GmbH & Co. KG, a global leader in the production of valve, measurement and control technology, uses the CRM solution PiSA sales in marketing and sales. The system enables all employees involved in customer processes to interact with smooth efficiency.

The GEMÜ logo is written in a bold, red, italicized sans-serif font, with a registered trademark symbol (®) at the end.

Customer & sector

As an independent family-owned business with a global focus, GEMÜ has made a name for itself as a provider of innovative products and customer-specific solutions for process media control since 1964 and is the established market leader in various key areas. The company maintains six production facilities in Germany, Switzerland, China, Brazil, France and the USA. Products are designed and developed at headquarters in Ingelfingen, where many of them are also manu-factured and assembled. An intelligent building block system and harmonized automation components make it possible to combine predefined standard products and customer-specific solutions to create more than 400,000 product variations. Worldwide sales are co-ordinated by head office in co-operation with 20 subsidiaries. The group of companies is represented in more than 50 markets throughout the world by a close-knit dealer network.

Initial situation & challenge

The company wanted to replace the former CRM system and migrate all the data saved there to a new CRM solution. The new CRM was to provide specific functions to support every department involved in customer processes. The objective of the project, in addition to achieving more efficiency, greater transparency and an overall improvement in process quality, was to expand the acquisition of new customers and perfect the process of addressing existing customers.

The consequences of these objectives for the CRM project included:

- ✓ centralized contact management across all business partners including a check for duplicates
- ✓ activity management to optimize interdepartmental co-operation
- ✓ optimum interaction between back-office and front-office
- ✓ efficient sales management and traceability of current tenders
- ✓ evaluation and analysis of customer contacts directly within the CRM
- ✓ simple user interfaces adapted to the workflow to achieve broad user acceptance
- ✓ availability of documents across facilities via an efficient document management system
- ✓ deep integration of the global Out-look/Exchange systems
- ✓ support of the multi-site concept of the corporate ERP solution, *PSIpenta*
- ✓ mobile availability of CRM data on notebooks and smartphones

Both content and interfaces have to be multilingual as GEMÜ wants to use the new CRM system in 20 subsidiaries around the world. The required languages were already available in PiSA sales Standard, and the future addition of further languages is already provided for thanks to UNICODE capability.

A further key factor in favour of the PiSA sales CRM was the high interface competence of the CRM provider with regard to *PSIpenta*, the ERP system in use at GEMÜ. This expertise is the result of a close, strategic partnership between PiSA sales GmbH and PSI Automotive & Industry GmbH.

Project course & solution

An intensive evaluation phase was followed by a test installation implemented by PiSA sales GmbH. In parallel, GEMÜ project managers visited related PiSA sales users to become acquainted with the practical use of the system. The basic decisions for the introduction phase were made during the subsequent workshop phase. These decisions concerned the subsequent design of the link to *PSIpenta*, the design of access administration and the adaptation of interfaces and functions to GEMÜ-specific requirements. The CRM was introduced at GEMÜ step by step. The software rollout started at the subsidiary in France, which was followed by Switzerland. The experiences of these subsidiaries were incorporated into the implementation project at the site in Germany.

This tried and tested approach enabled GEMÜ to gather valuable information that was of benefit to subsequent phases of the project. To have all of the subsidiaries in Europe, America and Asia working with the PiSA sales CRM by the time the international rollout is complete.



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Successes realized

The replacement of the old system was implemented quickly and smoothly in close collaboration with the PiSA sales GmbH.

Introducing a standardized CRM infrastructure to each subsidiary has harmonized how customer-related data and processes are handled. This has led to a number of significant improvements, including shared customer involvement across subsidiaries.

Existing customer and market data is now structured, enabling enabled target group segments to be redefined and a more differentiated approach to be adopted. The result is a more targeted and efficient use of capacities.

The consistent integration of the CRM system in business processes has resulted in a system that is “lived by” and not just “kept alive”.

Quick and concise access to sales-relevant information from the PSIpenta ERP is integrated in the system as a central information point for each customer.

In addition to online access to CRM data via notebook, field staff also make use of the mobile PiSA sales solution via iPhone and Blackberry smartphones. Documents, activity histories and sales transactions are available in addition to customer contact details at any time and at any location.

The marketing department, for instance, uses the PiSA sales CRM for mailings, targeted market cultivation and for planning and following up on events. It is now possible to accurately select contact partners and rely on duplicate free distribution lists thanks to the comprehensive information on prospective and existing customers stored in the system.

On a technical note, the standard ERP link was extended within the scope of the GEMÜ project by adding the multi-site functionality provided by PSIpenta ERP. Integrating the system in GEMÜ’s localized IT structure was another significant technical challenge. This entailed the integration of various groupware servers in each subsidiary.

The significant increase in efficiency and transparency in all of the processes involved and the productive collaboration between the partners are promising a continuously success of the overall project.

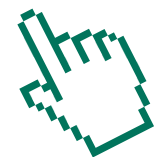
I appreciate the reliable and co-operative partnership that we enjoy with our CRM provider. Having direct access to the development department is of significant value to GEMÜ.

Heiko Schmitt, Project Manager CRM



We will be pleased to advise you!

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