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CRM Case Study- Hekatron

PiSA sales boosts quotation management at Hekatron

The fire-alarm systems, smoke detectors and door-release systems made by Hekatron set standards in safety using state-of-the-art technology. Accustomed to high standards in excellence, the company has opted to use the modular PiSA sales CRM system for effective customer support operations and increased quotation throughput.

HEKATRON
Ihr Partner für Brandschutz

Customer & sector

Hekatron is the leading specialist for the development, manufacture and distribution of integrated fire-protection systems. With a long tradition in the field, the company has time and again set itself apart in this special-ized market by achieving consistent growth and continual technological innovation that satisfies the most discerning demands in safety, economic efficiency and even design appeal. Hekatron cooperates with partner members of a nationwide network to build fire-alarm systems. It is a supplier to both specialized who-lesalers and OEM customers. Hekatron Vertriebs GmbH is a Securitas Group of Switzerland company. The parent is a family-run company with around 9,300 em-ployees operating around the world, 490 of them in Sulzburg, Germany.

Inital situation & challenge

Hekatron's extensive customer and buyer base (specialized businesses, wholesalers), its wide-spanning partner network and the fact that it caters to a specific mass market make it essential for the company to be a fast responder to and pursuer of projects as they arise. The company processes a vast volume of quotations which require quality calculations and a rapid rate of throughput to ensure the quick issuance of pertinent paperwork.

Its specific demands on the CRM project therefore included:

- replacement of the existing CRM system (SalesPro) and the loss-free transfer of all data stocks into the PiSA sales system
- extraction of all quotation-management and calculation processes from the ifax. OPEN ERP system for transfer into PiSA sales, including subsequent ERP-based handling
- possibility to record and evaluate sales-related parameters by the sales specialists
- to guarantee high ergonomics for the CRM system to achieve a more effective level of quotation processing using product configuration and workflow assistance
- centralized collection and utilization of sales-relevant data and the project- and
- customer-based presentation for all users
- administration of a multi-tiered complaints management program entailing a variety of workflows within the CRM system
- efficient subscription management for the "Pro Sicherheit" customer magazine
- administration of customer and seminar-participant data, including status tracking of participation and certification levels
- targeted offering of training, refresher training and certification measures as a safety and revenue-generation strategy

The intention was, ultimately, to have not only the company's sales, services and marketing outfits benefit from CRM introduction, but project and all after-sales operations, as well, by achieving fast and reliable quotation processing paired with time and cost reductions as well as closer customer proximity.

Project course & solution

The PiSA sales CRM system is already in operation at Hekatron for a long time and has since been upgraded to newer versions.

The first phase of the project saw implementation of the contact management and quota-tion processes. A solution was conceived in collaboration with the supplier of the existing ERP system to transfer all quotation and calculation processes from the ERP to the CRM system, with the completion phase remaining an ERP function.

One of the requirements was to maximize the rate of quotation throughput based on the better ergonomics afforded by this CRM system, to minimize work requirements for users and to thus optimize the whole quotation procedure. Owing to the flexibility and adapt-ability of the CRM system, it was possible to harmonize the standard comprehensively and upgradeable with the demands of the customer.

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These days, the relevant operations at the company are expeditious and list-based, with the applications functioning almost mouselessly. Close coupling to the ifax.OPEN ERP landscape already in place at the time has resulted in the ability to exploit cultivated pricing know-how from the ERP system for effective use in CRM. The introduction of direct, quick-response ERP queries by PiSA sales and iFax enables price information for the quotation process to be retrieved in real time from the CRM system. While pricing management processes transpire only in the one system, pricing information is actually made available in both.

As part of an upgrade of PiSA sales, a highly efficient system of complaints management was introduced to the CRM solution at Hekatron. The challenge was to map out the three-tiered support concept across different departments and a variety of workflows at the company. This was comprehensively achieved using integrated PiSA sales process definition. On-forwarding and on-processing of service notifications at the company or to external contacts transpires via process-based operations and a centralized application. Processing times have been cut back and transparency (status view) increased. The process is compre-hensible as well as being reviewable in the form of a report.

Successes realized

Introduction of the CRM system at Hekatron has seen the com-pany's quotation management operations made more effective and more efficient. The fact that it was coupled to iFax ERP sees PiSA sales deeply integrated into the existing systems landscape. It is easy to enter quotation items into the system, overwrite prices and apply discounts. The use of fixed and variable sets facilitates quick and variable configurations and quotation preparation. Intelligent dialogues available at the click of a button help users to add and store new items and the corresponding prices.

Coupling to iFax ERP additionally makes it possible to provide analyses (previously only possible in ERP) to other specialized departments. Sales revenue figures per customer (annual and monthly) are immediately retrievable in the contact function.

Regular reviews over the course of the CRM project and the soliciting, evaluation and implementation of requirements as determined by the system users have helped to generate a high degree of user acceptance and customer satisfaction.

The certificate management function implemented into the CRM system now enables the marketing unit at Hekatron to effectively monitor the status of certification levels for customers (e.g. in respect of fire alarm-system). Thereby safety-status and review-oriented potential for training or refresher training and certification measures are provided.

Hekatron's successful partnership with PiSA sales GmbH will now continue with further upgrades and the phased introduction of additional PiSA sales features.
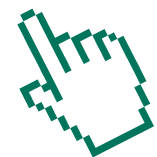
> *Hekatron has been using PiSA sales CRM since 2007. As a long-standing user we especially appreciate the partnership-based relationship with PiSA sales and the fact that we are able to exercise direct influence on standard developments.*
>
> Alexandra Weiß, Head of CRM Project

We will be pleased to advise you!

www.pisasales.de/en

PiSA sales GmbH
Fredericiastraße 17-19
D-14050 Berlin

Tel: +49 (0)30 810 700-0
Fax: +49 (0)30 810 700-99
info@pisasales.de
www.pisasales.de/en

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