

CRM Case Study- Siemens

Product logic in the sales process creates strategic added value

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SIEMENS PTD M employs NXTools+ for the projection and configuration of medium-voltage switchgears. The solution is based on the CRM software PiSA sales. As an open middleware it ensures flexible and efficient data management. NXTools+ is used worldwide and enables SIEMENS PTD M to avail themselves optimally of the opportunities of global markets.

Customer & sector

SIEMENS PTD M develops turnkey solutions for medium voltage power supply plants worldwide. The sales processes are complex. They include the technical connection of all system components as well as the coordination of the required services. SIEMENS PTD M thereby serves customers from different branches of the industry such as the steel industry, chemical industry, food and drink industry, automotive industry and the oil and gas sector.

Initial situation & challenge

SIEMENS PTD M discovered a large economization potential in care of customer relations at an early stage. In order to stay internationally competitive, an opportunity had to be provided to project all medium-voltage switchgears around the world integratively online, to configure them customer-specifically and edit them ready for quote. The requirements on the solution providers and the projection tool were:

- ✓ development partner with professional know-how
- ✓ central data record in one application
- ✓ worldwide access of the decentral projecting and sales units to the application
- ✓ assurance of consistency and completeness in plant configuration
- ✓ quote generation in consideration of basic local parameters such as language and currency
- ✓ seamless delivery of the production order to the ERP system
- ✓ simple integration of new plants
- ✓ upward compatible technology for constant advancement and adaption



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Project course & solution

SIEMENS PTD M cooperates with PiSA GmbH (later PiSA sales) for many years and successfully uses the technical projecting tool NXTools, which was developed collectively. SIEMENS PTD M chose the company on the basis of its long-time professional experience as an IT solution provider for the investment goods industry. Not only was the professional specialization convincing, but also the established and adaptable PiSA technology has convinced Siemens. On the one hand, plant configurations could quickly be integrated in the system with the aid of customizing, on the other hand the PiSA sales repository ensured the universal porting of the application worldwide. The project NXTools+ started as a follow-up project of NXTools. The challenge was to utilize the advantages of the latest PiSA sales technology for the technical projecting of medium-voltage switchgears.

The core objectives were:

- ✓ higher quality of technical projecting through improved interlocking concept
- ✓ price-conscious projecting through comparison of plants with equal technical equipment
- ✓ simplified operation of the application

As soon as 18 months later, the solution know-how of 10 medium-voltage switchgears total could be provided in the system. The implementation of the same number of plants in the system used by SIEMENS before NXTools would have taken several years. In the course of the project, the advantages of the new PiSA sales technology showed clearly:

- ✓ short developmental period through mapping of the configuration logic in the system and employment of XML for quote generation
- ✓ minor time and effort for the enlargement by new plant types
- ✓ little time and effort for the change of plant types
- ✓ technical logic can be stored easily as a central knowledge base

To the back office, NXTools+ offers an integrated solution from the quote up to the delivery of the production parts list to SAP. All staff members access the same up-to-date state of the product during projecting via the PiSA sales Windows client.

It is stored on a central server. The product logic is the same for all plants. It seems to it that medium-voltage switchgears and their components are configured faultlessly and that no position is missing in the quote documents. Complementary components such as low-voltage devices are projected in a separate application and are embedded via an interface. For control and documentation, the construction of the complete plant can be visualized graphically at the push of a button in Visio.

But NXTools+ does not only support technically. With the automatic pricing realized in a subsequent project step, the engineering company can monitor the total price of the plant as well as the prices of the individual components or modules during configuration. This can be an important gain of information, e.g. in situations when the favorable quote has to be created quickly or when special price expectations of the customer have to be considered.

In the system used so far, the price information was only available after the generation of the parts list. The completed quote and the assigned plant documentation are generated directly from the system and can be exported in up to 10 languages, even in Kanji for the Asian market. The required text modules are stored centrally in the data base and are therefore standardized globally.

If SIEMENS receives an order, the data are directly passed on to manufacturing. The engineers are able to smoothly work on the same project, even if their computers are thousands of kilometers away from each other. If new plants or changes in plants have been entered into the system, those are immediately available in all work centers around the world. Because all plant data, the associated configuration logic and the required configuration dialogs of the user interface are stored in the central data base, by the repository technology of PiSA sales.

Successes realized

NXTools+ is applied internationally. Whether in Denmark, Austria, the USA, Brazil or Thailand, staff members around the globe handle quotes and orders in the same manner. The quotes can be generated in multiple languages and arbitrary currencies.

Furthermore, NXTools+ centrally provides standardized solutions. Customers with the same wishes are offered the same plants globally. Thereby the time and effort in the offer phase could be reduced significantly. In detail, this means:

- ✓ shorter processing periods save time
- ✓ faster alternative quotes reduce time and effort
- ✓ the common access to solutions that have already been worked out by staff members taps saving potential.

The simple integration of new plant configurations gradually expands the solution know-how provided in the application. „Customizing allows for considerable reduction of time and financial effort of data maintenance for the extension of additional medium-voltage switchgears“, says the head of NXTools+ project.

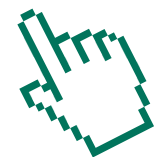
**” PiSA is a reliable partner of SIEMENS already since the mid 90s.
The integrative concept of PiSA sales convinced us immediately!**

Dr. Gabriele Herold, former Project Manager



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

Request CRM information package:



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