

CRM Case Study- KELLENBERGER

Proven precision also in customer relations

KEL-VITA
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If absolute precision is called for, that's when KELLENBERGER precision grinding machines come into play. KELLENBERGER, in turn, relies on the PiSA sales CRM system to help it provide individualized customer care, keep its business processes at the cutting edge, and perfectly align its worldwide services with the needs of its customers.



Customer & sector

Originally called L. KELLENBERGER & Co., the company was founded by Leonard Kellenberger in 1917 and now goes by the name of L. KELLENBERGER & Co. AG. These days, it is considered one of the leading global manufacturers of hydraulically and numerically controlled precision grinding machines and systems for application in medium- and high-level technology fields. It owes this market positioning to its efforts to systematically develop high-precision technology. L. KELLENBERGER & Co. AG is a member of the Hardinge Group of Elmira, NY, USA. KELLENBERGER employs around 460 people at its St. Gallen, Romanshorn, Biel, and international sites and engages agents and partner companies around the world. The company offers a broad range of services to safeguard its pledge for the 100-percent availability of its production machines.

Initial situation & challenge

With a resolute focus on customer and market needs, the company determined that, to achieve better process quality in sales and services, it needed a shared information platform that would transcend departmental boundaries. Such was not achievable on the basis of the stand-alone solutions it had been employing to date (ACCESS, KEL-DATA, Excel, Word). The main objective of the CRM project was to optimize sales processes at KELLENBERGER.

It quickly became apparent, however, that in a complex environment such as this one, involving the development, production, and sale of state-of-the-art precision machinery, its service operations, too, would need to be incorporated into the system of customer relationship management.

For the CRM project, this essentially meant:

- ✓ replacement of the old sales database
- ✓ replacement or integration of the old KEL-DATA system (machine configuration)
- ✓ the complete, zero-loss transfer and reproduction of existing data from the old systems
- ✓ integration of the JDE ERP system, including data migration and exchange between the JDE and PiSA sales systems
- ✓ mapping out of the links between commercial sales processes in CRM and parallel in-house processes such as acceptance, quality control, suppliers, freight carrier, etc. within a single project (machine)
- ✓ mapping out of sales agents, including region and product allocation for the automatic assignment of representatives and account managers
- ✓ integration of service operations into the CRM process, including service-incident reporting and post-service processes

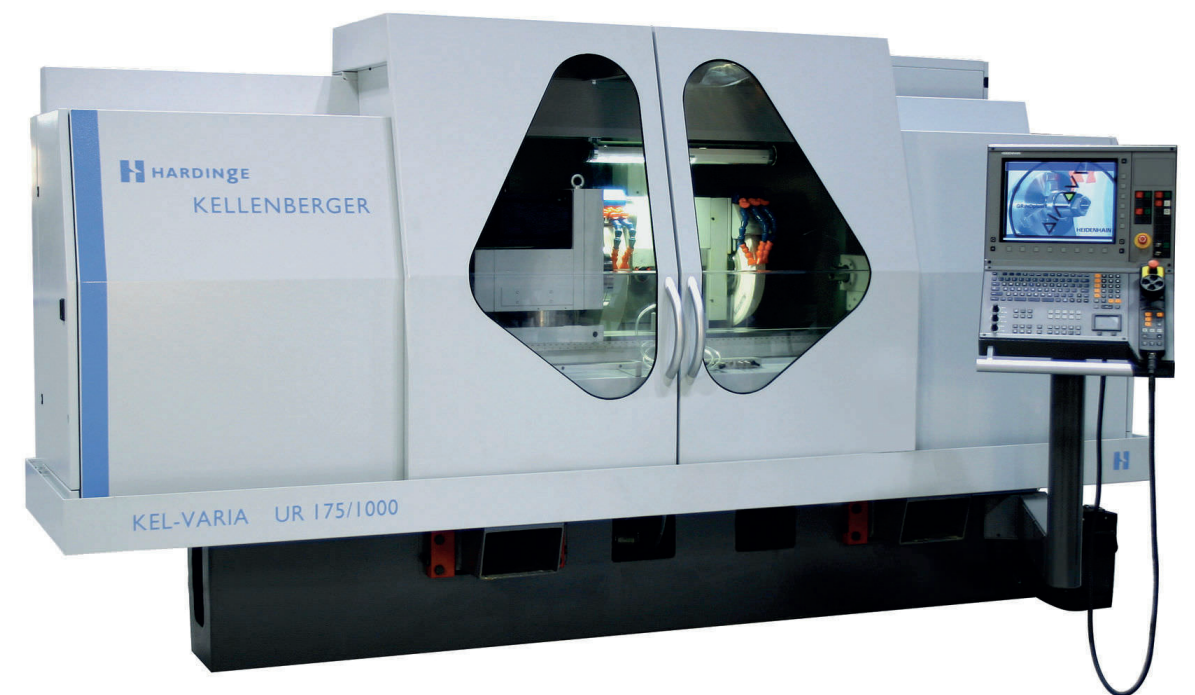
Some of the comprehensive PiSA sales standard functionalities were individually customized to satisfy the specific requirements of the company.

Project course & solution

In addition to the migration of all quintessential sales data, it was important to also transfer configuration data on machine set-ups to PiSA sales.

The interface for exporting data from PiSA sales to the JDE ERP system proved a particularly interesting challenge given that the JDE database schema is very different to that of the CRM system. The technology used for data exchange between these systems is based on Standard Business Services by JD Edwards.

The experts from KELLENBERGER and PiSA sales collaborated closely to generically convert the objects designated for export to JD Edwards web-service cues. The method used also enables the interface to be easily expanded to accommodate any additional requirements.



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It was determined at the initial workshops that, for the sake of effective operations, service activities at KELLENBERGER would need to be incorporated into the CRM system.

PiSA sales offers a service-oriented view on products set up at customer sites. By defining service objects, i.e. service-relevant products, the data and information relating to those objects is rendered storable and maintainable in the system (service/machine file).

Replacement of a number of individual solutions previously used in the company's service operations with the PiSA sales solution resulted in the addition of a host of extra information-management attributes and functionalities to the service object. The information previously stored in complex directories was either transferred straight into PiSA sales or tied into the PiSA sales system via hyperlinks, giving users an operator interface from which to access machine-relevant information.

Realisierte Erfolge

The PiSA sales CRM system has created a uniform data basis for all operating areas at KELLENBERGER and, for the most part, has done away with the need for the stand-alone solutions the company employed to date. Customer and product information is now retrievable throughout the company within a matter of seconds.

Sales operations at KELLENBERGER are project-oriented and project-driven - as is typical for a machine manufacturer. PiSA sales CRM ideally supports this mode of operation at KELLENBERGER. The CRM system views the machine as an overarching project (project folder) and references it as such in service-related processes. Once an order has been finalized, a service object can be created, including all the project allocations, or a ready-made machine can be allocated to an order. All information linked to that machine will thus be structured and centrally managed.

To enable service staff to continue employing the procedures they had become accustomed to, at least for the most part, PiSA sales supplied specially adapted masks. This had a positive effect in terms of user acceptance. The service masks provide a quick overview of machine information and allow conveniently quick system entry of relevant data. A service-incident-reports overview containing information on individual service incidents and the service objects (machines) makes information readily available to employees based on the machine number. Additional service incidents reported can be entered into the system across the entire lifecycle of the machine using this handy reference.

On the whole, introduction of the PiSA sales CRM suite has significantly enhanced process quality in the departments connected to it. Customer data can now be accessed more quickly and response times to customer inquiries have been markedly improved.

With go live of the new system and with introducing a quote and product configurator as well as additional CRM features, the successful collaboration between PiSA sales GmbH and L. KELLENBERGER & Co. AG is continuing.

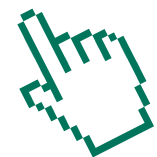
” *What makes the PiSA sales CRM system so compelling is how capable and versatile it is. Personally, I also very much appreciate the partnership-based approach this provider takes.*

Werner Winteler, Head of In-House Sales Staff



We will be pleased to advise you!

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