



Bright side of CRM



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Any enterprise whose priorities include not only selling a product to the customer, but also providing professional technical inspection and maintenance support, must implement a comprehensive, reliable and easy-to-use customer relationship management system.

The fact that modern tools and services provided in the cloud model are useful in all industries – not only IT or e-commerce – is illustrated by Malchem, a producer of paints and industrial corrosion protective lacquers. The company needed a CRM solution that would permit establishing and maintaining a clear picture of customer relationships at all stages of cooperation, monitoring sales results on an ongoing basis, and responding to undesirable situations in no time by informing about alarming signals, e.g. an exceeded credit limit or an overdue payment. These are tasks the old system, which had been used by Malchem employees from 2010, could not handle.

"A CRM system should facilitate customer base management and more. Its operation ought to be simple and intuitive. The previous system failed to satisfy our expectations in 100% and that is why we decided to make a change" – Cezary Malski, President of the Management Board, says. The choice fell on Sales Cloud platform by Salesforce.com, and the deployment was entrusted to Cloudity. "Cloudity's offer was selected from among several others due to the possibility to adjust individual system components to our vision and needs. The deployment process was divided into a few stages and each of the departments was given some time to become familiar with the system and to undergo a professional training course delivered by Cloudity representatives" – Malchem President recalls.


The deployment began with defining expectations for a new system. The CRM was primarily supposed to ensure greater effectiveness

and transparency of sales activities and provide sales staff with comprehensive information about customers. In order to perform their tasks more efficiently, employees needed a specialised and efficient reporting tool to provide them with full insight into individual stages of sales processes. The history of actions, customer relationships, orders, complaints, meetings and payments – all in one place, with no need to search various systems, electronic mail, notes and other resources. What was especially significant was also automation of repetitive actions taken by sales staff, who devoted much attention to use communications, prepare commercial offers and report working time. Simplification was also necessary in the case of processes of generating and sending reminder letters as well as monitoring current sales results and customer indebtedness.

The first deployment phase of Sales Cloud platform took place in February and March 2015 and focused on environment implementation alone. The main module that was introduced at that time was a system for preparing technical and commercial offers for customers, which are prepared by Malchem in large numbers. "Owing to the simple interface and easy operation, we now have an overview of the number of offers sent. We can always check the stage of a given project. The system was adapted to the operations of the commercial department, including the sales and supply, marketing and technological departments" – Cezary Malski explained.

"The offer generator was created totally from scratch" – Adam Butak, Business Consultant in Cloudity, admits.

Thanks to the system, offer preparation and order management is much faster. The problem of 'lost' orders and complaints dissapeared.



Before that, preparation of an offer consisted in preparing a Word document, verifying the available products and their prices in internal corporate documents (or upon the commercial director's approval), sending the offer to the customer by email, generating the offer ID in a separate system and saving it in the internal archive. "Now the enumerated actions are automatic. The salesperson simply clicks the offer by selecting appropriate entries, products and addressees. The average offer preparation time has been reduced several times and is now 2-3 minutes" – a Cloudity representative informs.

An interesting deployment component is a localiser of enterprises, which is useful mainly to sales representatives, who often work outside the office. Business trips can be used both for meeting existing customers and seeking new ones. "Earlier, in order to verify prospective customers, sales representatives used their notes. Now, they can display all accounts near the visited one and filter them using any criteria, e.g. the time of the last visit, turnover or distance, in the system they can access on their mobile device" – Adam Butak assures.

The second deployment phase, which was completed in July 2015, consisted of the integration of the Salesforce system with the ERP software used in Malchem. It was a major challenge, mainly due to the fact that the ERP system did not have sufficiently detailed technical documentation or API, at the same time being frequently updated by the producer. What proved crucial in Salesforce integration with ERP was elimination of problems with synchronisation of data about customer accounts, invoices and payments – it is the basis of a non-standard solution in the form of a debt collection notification subsystem. Its principle of operation is that the customer whose invoice due date is imminent (or has elapsed) receives an automatically generated email notification. Such a notification is sent also to persons responsible for individual customers and to the accounting department.

The addressee and the kind of notification are fully configurable for each customer – it can depend on the debt amount, the period since due date, or turnover volume. In the case of problems with synchronisation, users would not receive relevant notifications about overdue amounts, which could result in the necessity to have a third party debt collector deal with such an enterprise and, consequently, incur greater costs.

The solution was prepared on an iterative basis (the so-called agile approach). "We presented new features to the customer on an ongoing basis, we collected comments, and introduced the required modifications. Such an approach minimises the risk of delivering a feature that fails to satisfy customer needs. We employ it in every project" – Adam Butak persuades.

It turned out that this method worked perfectly, above all due to the strong commitment of all interested parties: both Malchem management staff and representatives of all departments which were supposed to actually use the solution. Owing to that, the customer was able to become familiar with successive subsystems at a very early stage and, as a result, it was possible to quickly verify if the project satisfied the assumptions and to introduce the necessary adjustments. Importantly, the preparation and deployment of the Sales Cloud system were also on schedule.

And how has the deployment affected the efficiency of the tasks performed by Malchem staff? Opinions about the Salesforce system and cooperation with Cloudity are very positive. "According to one of our sales representatives, the tool assists sales and does not hamper work. We have a calendar, messages, a database – all in one. We can prepare marketing campaigns, easily send out mass mailing, examine the quality of customer service, and prepare reports in a simple and logical manner. In short, the change of the system has had a very positive impact on employees" – Cezary Malski says.

The scope of the project included creation of the order management engine. We implemented also a flexible reporting system which automatically informs the board and sales reps about the most important indices.


Cloudity

Cloudity is a technological company providing consulting and implementation services. Since its establishment in 2014, it has been successfully executing projects on the Polish and European market. As a Platinum Consulting Partner, it develops the Salesforce ecosystem in Poland and Europe, at the same time supporting its customers in launching such products as Sales Cloud, Service Cloud, Pardot, Marketing Cloud, or Work.com. Cloudity also develops its own business applications based on the force.com platform.

 **MALCHEM**
FARBY ANTYKOROZYJNE

MALCHEM, a paint and varnish manufacturer, established by Jarostaw Malski (1948-2008) in 1981. has a long standing experience in production and application of paint and varnish coating to protect objects and facilities against corrosion attacks in chemical, construction, machinery and mining industries, ship-yards, power plants, road transport and community management services.


salesforce

Salesforce is the global leader on the CRM and business applications market. It has been transforming the business world by moving software to the cloud for 16 years now. The development of an ecosystem of applications operating based on the cloud computing technology has enabled thousands of entrepreneurs to pursue their business activities more easily and more efficiently.