



Case Study

INNIO Uses Next-Level CRM  
Salesforce as a Strategic Platform  
for a 360-Degree View of the Customer

**CLIENT** INNIO Jenbacher GmbH & Co OG

**SECTOR** Branded Goods & Industry

**PROJECT** Implementation of Salesforce Service Cloud and  
Salesforce Community Cloud

**PROJECT PERIOD** April 2019 – October 2019

**TECHNOLOGY** Salesforce Service & Community Cloud

## About INNIO

INNIO is a leading solutions provider of gas engines, power equipment, a digital platform and related services for power generation and gas compression at or near the point of use. With the Jenbacher and Waukesha product brands, INNIO pushes beyond the possible. The headquarters with about 1,700 employees is located in Jenbach (Austria), the company's other main places of operation are in Welland (Ontario, Canada) as well as in Waukesha (Wisconsin, USA).

INNIO has a diverse product portfolio and fulfils the requirements of numerous industries in the power range between 200 kW and 10 MW. Reliability, economic efficiency and a long product lifespan not only distinguish INNIO's products and solutions, but also its service. INNIO currently provides life cycle support to more than 48,000 delivered gas engines worldwide.

The history of the company started in 1269. The first gas engine was manufactured in 1956. The Republic of Austria founded »Jenbacher Werke AG« in 1959. Ever since, INNIO has been an expert in adapting to changing times as a company, both internally and externally.

60 years of corporate history full of changing affiliations, investors and main areas of focus have shaped the way from Jenbacher Werke AG via Jenbacher Energy Systems AG (JES) and Jenbacher Transport Systems AG (JTS) to today's INNIO Jenbacher GmbH & Co OG.

Until November 2018, INNIO was part of General Electric (GE). The acquisition by Advent International involved the product brands Jenbacher and Waukesha gas engines, which, however, were set up as independent units. Under the umbrella brand INNIO, both product brands supply customers in more than 100 countries across different industries with innovative solutions for power generation and gas compression.



**INNIO**  
INNIO Service Op...  
Cases

50+ Items - Updated 2 minutes ago

Search this list

DATE/TIME OPENED

Case ID	Date/Time	Description
JW-2020-1282	29/01/2020 14:07	00355145 Concession request
JW-2020-1281	29/01/2020 13:58	00355127 Concession request
JW-2020-1280	29/01/2020 13:22	00355124 Aftercooler cone Delta p. high
JW-2020-1279	29/01/2020 12:51	00355128 Ignition mfl. trouble
JW-2020-1278	29/01/2020 12:40	00355115 Missing fuel washers
JW-2020-1277	29/01/2020 12:26	00355118 Deflect TEC. not torn
JW-2020-1276	29/01/2020 11:29	00355115 Spew plug is replaced with new one
JW-2020-1275	29/01/2020 11:27	00355113 Cylinder Head is replaced with new one
JW-2020-1274	29/01/2020 11:26	00355110 Damaged pressure transducer
JW-2020-1273	29/01/2020 10:53	00355025 Ball cups replacement (per unit 15)
JW-2020-1272	29/01/2020 10:43	00355023 V176_Bearrings Pringelager and Ringelag
JW-2020-1267	29/01/2020 12:26	00355058 Ball cups replacement (per unit 15)

**Case JW-2020-1079**

Case Type: New Units Warranty  
Case Owner: Dietmar Mollitor  
Case Title / Problem / Symptom: Ignition mfl. trouble  
Workshop: Pending Problems / Invoice  
Submitted by: Jeroen Myrnes  
Case Urgency: Normal

Event / Asset Details | Case Comments | Quality Plan | Parts To Repair | Amount Details | Move

**Case Details**

Case Title / Problem / Symptom: Ignition mfl. trouble  
Problem Description: Problems with ignition. Active warning at working engine on cylinder 104 (ignition number 3544, 3545). Broken monitoring module (SAFI) of cylinders 104 & 105.  
Status: Repair in Progress  
Case Urgency: Normal  
Assigned Group: Jenbacher Warranty

Case Owner: Dietmar Mollitor  
Check # Number: 905547  
Check # Serial # Number: [Redacted]

Engine Model: Mfl. Trouble (Ignition Mfl. Trouble - 3545) [Download]  
Created Date: 29/01/2020 12:15  
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Engine Model: Mfl. Trouble (Ignition Mfl. Trouble - 3545) [Download]  
Created Date: 29/01/2020 12:15  
Download

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Upload Cancel

53 Files (Case) (2)

External CC links (0)

Internal CC links (0)

## From Migration Project to Platform Vision

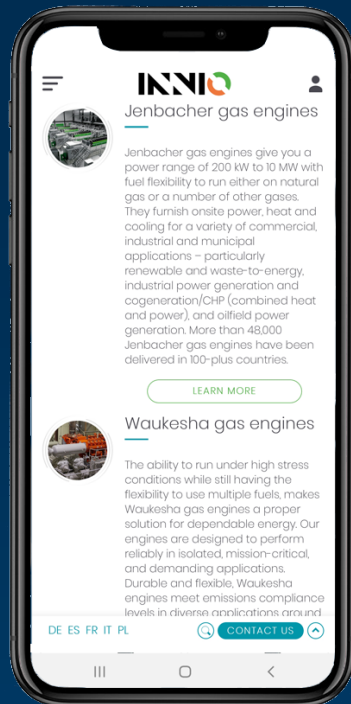
INNIO is already very well-positioned in the field of digital transformation. In particular in the field of IoT, the company has already had successful use cases with myPlant. With these asset performance management solutions (APM), problems can be recognised at an early stage and analyses can be carried out more quickly.

Over the course of various acquisitions and not least within the context of digital change, INNIO's IT infrastructure has undergone and continues to undergo comprehensive transformation. As part of the acquisition by Advent International, which was pending at the time, it was agreed that INNIO could continue to use ServiceNow – the system for handling service tickets – until October 2019.

The imminent change presented INNIO with several challenges at once, but also offered the company the opportunity to put current processes to the test in order to position itself as an umbrella brand for Jenbacher and Waukesha gas engines in a future-proof manner, to systematically maintain and expand customer relationships and to design them in a digital way.

INNIO used the pending acquisition to address the »big picture«: a platform strategy as well as the standardisation and harmonisation of all applications and processes in the areas of sales and service together with its partners. Because only if internal processes and systems are efficiently connected to each other, holistic and thus promising customer relationship management is possible.

## 360-Degree View of the Customer with Salesforce



In October 2018, INNIO approached the digital experts at dotSource in search of a new CRM solution. On the one hand, the new CRM system was to take over the processes of the existing CRM system one-to-one; on the other hand, it was to be fully implemented by October 2019.

The separation from General Electric's IT infrastructure affected both case management and all other functional areas of the company – from human resources to finances to field service. Besides the case management project, many other IT projects were and are partly still being carried out.

Because INNIO had already used Salesforce Sales Cloud, the expansion of the portfolio to include Service and Community Cloud – particularly with regard to the desired 360-degree view of the customer – was the next logical step.

In April 2019, INNIO commissioned dotSource to implement Salesforce Service Cloud and Community Cloud and to further develop its Sales Cloud.

As an experienced Salesforce Partner with a young, ambitious team and an agile approach, dotSource was able to establish Salesforce as a strategic platform in record time – for the current project as well as for future undertakings and visions of INNIO Jenbacher GmbH & Co OG.

## Best-of-Suite Solution for the Best Customer Relationship Management

dotSource chose the best-of-suite approach to establish the Salesforce platform and reach the related goal of optimising INNIO's service processes to improve the quality of customer relationship management. In general, this approach is used to combine software solutions whose integration has already been completed.

Because INNIO – as previously mentioned – had already worked with Salesforce Sales Cloud, setting the multi-cloud perspective as the next milestone of the platform strategy was the next logical step. The expansion to include Salesforce Service Cloud and Salesforce Community Cloud not only offered INNIO enormous advantages with regard to the technical integration effort.

Basically, a solution from one source is already prepared for the cooperation of partial solutions.

A shared back end that filters and processes data and tasks according to roles provides the starting point.

All systems access the same data which in perspective means less coordination effort, higher data consistency, but also an optimisation of internal processes. Moreover, it guarantees the possibility of quickly and flexibly adapting to possible changes and spontaneities.

It is another advantage of the best-of-suite solution that INNIO only has to work together with a single sales and service provider. This saves time and resources which, in turn, can be used for intensive customer support.

»We have succeeded in reaching our goal in time before the TSA exit deadline because of the dedication and commitment of the entire team. I would also like to point out the responsiveness of the dotSource team! We were always able to reach someone who would support us immediately.«

Tatjana Neuschmid-Uzelac,  
Product Owner INNIO

## With Old Processes to the New Business Model in Record Time

However, the purely technical integration of a new, pioneering system landscape alone does not improve service processes. Various complex processes as well as a data model that can map the different requirements of the two product brands were set up for the case management of Jenbacher and Waukesha.

It was a challenge to take over the processes of ServiceNow, some of which are very extensive, one-to-one as they are far from the Salesforce standard. Furthermore, INNIO and the project team were under immense time pressure because the contractually agreed shutdown of the old system was imminent and could not be negotiated. Thanks to the flexibility and the ambitious commitment of the dotSource team, the implementation was nevertheless achieved in record time.

This made the work of those responsible at INNIO considerably easier. Because Jenbacher and Waukesha not only represent independent brands but are also subject to different laws and regulations due to their different country affiliations and pursue individual business use cases, a systematic concept with correspondingly comprehensive case management processes was urgently required.

With Salesforce as a strategic platform, INNIO can now realise the full potential of the best-of-suite solution. Regardless of unit and location, it is easy for INNIO employees to maintain and manage the system. This significantly simplifies the administrative handling of company-internal, but also external processes with partners, suppliers and customers.





# User-Friendly Processes in a Complex IT Landscape

The following processes are mapped via Salesforce Service and Community Cloud:

- Warranty Claims: warranty management for Jenbacher and Waukesha gas engines (including the sub-processes for the settlement of working hours and customs duties)
- Track and Trends (T&T): process that aims to identify, monitor and, if necessary, transfer frequently occurring problems to the root cause analysis process (RCA)
- Technical Issue Resolution (TIR) Cases for Jenbacher and Waukesha: technical support, e.g. INNIO solves problems for customers and channel partners
- Product Safety Topics: it is shown within the TIR process whether an existing problem is, for example, a product safety problem.

## Connection to the Existing System Landscape



Besides the implementation of these processes, dotSource also took over the connection of the IoT solution myPlant and the integration of Oracle ERP via the recently introduced middleware Lobster.

The myPlant integration was implemented in a way that allows data to flow in both directions. Case data is exported from Salesforce to myPlant and used for further processing (for example to update analysis data) and to assist in handling technical support cases.

Moreover, sales partners and internal employees can create a new Salesforce case in myPlant Analytics. Some case fields are already filled in advance.

Even when creating a case directly in Salesforce, current machine data is extracted from myPlant.

Just like the myPlant connection, the ERP integration was also bidirectional. Various case data is sent from Salesforce to the ERP at different trigger times to automatically create service requests or tasks in the ERP. Over the course of the case process, Salesforce cases are updated by the ERP and sometimes even closed automatically.

Parallel to the implementation of Salesforce Service & Salesforce Community Cloud and their integration into the existing system landscape, dotSource also took care of the ongoing support for the Sales Cloud that had already been in use.



## Conclusion and Outlook

Thanks to the migration from ServiceNow to Salesforce Service Cloud and Community Cloud, the project team was able to reduce the complexity of INNIO's IT landscape in record time, thus significantly improving service and sales processes.

Thanks to the successful carve-out at the desired point in time, INNIO's employees have access to a user-friendly, easy-to-manage system that holds great potential for the company's vision of the future.

## About Us

dotSource, that's over 300 digital natives with one mission: designing digital customer relations. Our work rises from the connection of humankind, space, and technology.

We've been supporting businesses in their digital transformations since 2006. Whether e-commerce and content platforms, customer relationship and product data management, or digital marketing and artificial intelligence: our solutions are user-oriented, emotional, targeted, and intelligent.

We see ourselves as a partner of our clients, whose special requirements and needs flow into the project straight from the first idea. From strategy consultation and system selection, to branding, concept creation, UX design and conversion optimisation to operation in the cloud – together we develop and implement scalable digital products. Our approach relies on new work and agile methodologies such as scrum and design thinking.

Companies like Esprit, EMP, BayWa, Axel Springer, hagebau, C.H.Beck, Würth and STABLO trust in our competence.

With our blog Handelskraft.com, annual Trend Book, and Handelskraft Conference, we network industry knowledge and provide insight into current opportunities and developments of digital brand management. In order to comprehensively prepare professionals and executives for the entrepreneurial challenges of the digital world, we launched Digital Business School together with Steinbeis Technology Group in 2015.

With our groundbreaking solutions, we have been able to establish ourselves as one of the leading digital agencies in German-speaking Europe and are now among the top 10 largest companies in the industry.

K5ILIGA



# DIGITAL SUCCESS RIGHT FROM THE START.

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