



CASE STUDY: IMPROVING COMMUNICATIONS FROM EMPLOYEE TO THE CUSTOMER

REGO-FIX is a Swiss manufacturer of premium tool holding systems for manufacturers in aerospace, automotive, medical, watchmaking, mold and die, and machine tool industries.

Clouds Utilized



Sales Cloud



Pardot

Systems Replaced

Goldmine CRM

3rd Party Integrations

Quoteworks, Macola

"We're still relatively new when it comes to Salesforce, but the results so far have been impressive. We're seeing greater efficiency, visibility, and accountability, which is critical for maintaining strong customer relationships and identifying ongoing development opportunities."

NuAge Experts has put us on the road to digital transformation, and we're excited about the possibilities ahead."

LYNN GRABNER

Marketing Manager, Rego-Fix

THE CHALLENGE

Fix silos across sales, marketing and service

- Siloed systems and databases made it difficult to create a single source of truth for customer operations
- Wanted a centralized system to manage tests, trials, and cases that all tied back to their CRM

NUAGE'S SOLUTION

- Integrated Salesforce with two of REGO-FIX's main systems—Quoteworks and Macola
- Created centralized operations center for transparency and efficient communication between teams, departments, and customers
- Custom Salesforce interface design to simplify tasks and simplify the most common actions (tests and trials, quote generation, and case management)

RESULTS + ONGOING INNOVATION



Realized a 360-degree view of their customers using Sales Cloud, Pardot, and third-party integrations



All key data ties back to their CRM records in Salesforce



Strong data integrity across customer touchpoints



Automated record transfers into Salesforce saves time and provides key customer insights