

**SYBIT**



Success Story

## **Symbiosis of Sales and Service**

**zehnder**

# The Company

**The first steel tube radiator in Europe came from Gränichen (AG). With this innovation in 1930, the Zehnder Group achieved international success and is now recognized as a full-service provider for indoor climate solutions.**

Comfortable ventilation systems, heating and cooling ceiling systems, air purification systems, and designer radiators are just a few examples from the product portfolio of this publicly listed company. The assortment is vast, and the customer base is extensive. To maintain full oversight and continue meeting customer needs, Zehnder introduced two new SAP solutions alongside its existing ERP system – strengthening the crucial collaboration between sales and service. Today, detailed customer data is available at a glance for both departments. This saves time, enhances capabilities, and deepens customer relationships.



# Starting Point

**From a humble one-man business to an international group of companies, Zehnder quickly and successfully conquered Switzerland in the 1920s with the 'Zehnderli' small motorcycle.**

The company achieved its international breakthrough in 1930 with the development of the first tubular steel radiator in Europe, which remains Zehnder's best-known product to this day. The company's history is characterized by inventiveness, entrepreneurship and customer orientation. In 1979, the company made its way back into the hearts of the Swiss by launching the first bathroom radiator, which is still a successful product today.

## Swiss Climate Pioneers

The Swiss family-owned company has grown into a full-service provider for indoor climate solutions and now operates in over 20 countries worldwide. The Zehnder Group, now in its fourth generation of leadership, attributes its success to one key factor: Customer Experience. Zehnder's goal is not simply to sell products but to be a long-term solution provider – no easy task in a fast-paced world. Project cycles in the construction industry are getting shorter, and suppliers and partners must be able to react quickly.

## New Paths

To stay agile across all areas, the company decided in 2017 to modernize its sales and service departments through digitalization. Zehnder aimed to move away from paper-based, time-consuming processes toward digital customer touchpoints. Sven von Allmen, GPO Sales & After-Sales at the Zehnder Group, recalls: *'Our former Customer Experience program was no longer up to date. It couldn't be used in all countries and lacked the features necessary for a clear, centralized data foundation.'* This lack of visibility hindered day-to-day operations.

# Objective

**An example of the challenges at the time: The field sales force was very dependent on the back office, which effectively managed most of the customer information.**

EA feat of strength when you consider that a regional sales representative at Zehnder looks after between 100 and 400 customers and that several hundred sales representatives work for Zehnder Group in Europe alone. The regular internal consultations and shadowy worlds of paperwork were becoming unbearable time wasters and the valuable time spent on site with customers was being jeopardized more and more.

## Setting the Right Priorities

The goal in sales was clear: to reduce the administrative workload and gain more time for quotations and customer visits. In addition, the all-important 360-degree view of the customer needed to be guaranteed and quickly accessible to all internal stakeholders. *'We wanted to increase the quality of sales and strengthen the skills of our sales staff,'* says Sven von Allmen. The objectives for the service processes were similar.

## Strengthened Teamwork

Service and sales go hand in hand when it comes to customer care, customer loyalty and after-sales. The service technicians provide important customer data that can lead to additional sales in the sales area. Until recently, however, service reports were written on paper by hand by the technicians, scanned and filed differently depending on the location. *'A lot of valuable data didn't find its way to the sales department before,'* says Sven von Allmen. That was about to change.

# Solution

**Zehnder has been using the ERP software SAP ECC since 2011. This system has been rolled out across all European locations and continuously adapted to meet the company's evolving needs.**

Future solutions were also expected to offer this same level of flexibility and strong integration with the core SAP system. It quickly became clear that the new sales and service systems should come from the same provider. In 2017, in collaboration with the Sales department, the IT team selected SAP Sales Cloud, with implementation beginning that same year. The transition from the previous 15-year-old CRM system to new customer experience processes was complex and required significant resources.

## External Support

Franz Furrer, Head of IT at the Zehnder Group, recalls: *„We were very glad to have a competent partner at our side who provided us with CRM-specific expertise and additional IT resources.’* The company chose SYBIT GmbH as its partner – a full-service digital agency, CRM specialist, and long-standing SAP partner. Thanks to the successful collaboration, the go-live went largely smoothly, allowing the team to begin a second implementation project shortly afterward – sooner than expected.

## Favorite Modules

In 2020, Zehnder launched the SAP Field Service Management (FSM) system. The two new systems are connected – both through the ERP platform and through custom-built interfaces. Looking back, tight collaboration with SYBIT and clean process harmonization were key success factors for Franz Furrer and his team. *„To other mid-sized companies considering a similar project, I would recommend thoroughly rethinking all processes and entering the concept phase with a clear vision,’* says Furrer.

# Benefits

**Today, neither the sales managers nor the service technicians want to do without the new solutions – both departments benefit from significant efficiency gains.**

Previously, service technicians had to plan their own service routes. Now, service orders are scheduled centrally and digitally via the FSM system. A new feature called *‘Best Matching Technician’* has proven to be a real efficiency driver. According to Daniel Binggeli, Head of Service CH at Zehnder Group Schweiz AG: *„Thanks to the new Field Service Management system, we were able to process 10% more service orders within just six months.’*

## Happy Zehnder Customers

Zehnder's customers are also noticing the upgrade. In the past, it could take up to two weeks to receive a service report. Today, the report can be generated and sent directly after the service appointment via FSM. This is especially valuable when commissioning a new system. The collaboration between Service and Sales has also become more effective. As Sven von Allmen explains: *„Regional Sales Managers now have real-time access to customer data in their area – whether it's from regional sales reps or the technicians assigned there.’*

## A Feature Paradise

Thanks to streamlined opportunity management and the visit planning and customer classification features, long meeting sessions are a thing of the past. The entire sales pipeline and customer history are now visible at a glance. *„Our salespeople appear more competent thanks to the 360-degree customer view. They focus on the most promising opportunities and ultimately increase their closing rates,’* says von Allmen. The system also offers reliable offline availability, which is especially important in countries with unstable mobile networks. Looking ahead, the new Customer Experience solution is also expected to be rolled out to partners – further strengthening proximity to end customers, both digitally and in business.

# We Create CX Champions.

**500+**

customers

**350+**

employees

**100%**

customer-centric

**No.1**

in CX across Europe

**Top 10**

IT employer

**25+**

years of experience



**Let's Take the Next  
Step Together!**

+49 7732 9508-2000

[sales@sybit.de](mailto:sales@sybit.de)

Sybit GmbH  
St.-Johannis-Str. 1-5  
78315 Radolfzell  
[www.sybit.de](http://www.sybit.de)