SAP Sales Cloud-Implementation

Case Study

Seven million pieces of data transferred into the cloud:

TRUMPF optimizes global sales and marketing processes with SAP

As a market and technology leader in the area of machine tools and laser technology for industrial production, the TRUMPF Group is active in virtually every sector with its innovations. Its software solutions are helping to smooth the way towards the Smart Factory, and the group facilitates high-tech processes in industrial electronics around the world. The long-established company sees its core remit in developing production technology further, making it cost-effective, accurate, future-proof, and networked. This includes transparent and efficient customer service.

The company's legacy CRM system no longer guaranteed the latter adequately. Consequently, TRUMPF's IT and sales department decided to implement SAP Sales Cloud in collaboration with the consulting and implementation partner Sybit. The implementation of the solution has significantly improved the marketing and sales processes at the parent company and the subsidiaries, thus driving forward the third pillar of the TRUMPF Industry 4.0 Digitization Strategy: digital networking in the company's own value chain.

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Short Facts

Company: TRUMPF Group
Headquarters: Ditzingen
Industry: Mechanical Engeneering
Employees: 12.000
Revenue: EUR 3,1 billion (2017 fiscal year)
Solutions: SAP Sales Cloud, SAP ERP
User group: Sales, Marketing

The Remit

The legacy CRM system had been in use for 20 years. It was failing to fulfil the technological requirements placed on a CRM system and could no longer map the marketing and sales processes of the growing company adequately. At the same time, it did contain data that needed to be preserved: some 425,000 contacts, 140,000 prospective customers,

600,000 activities, 350,000 documents, 180,000 quotations, and much more, over seven million pieces of data in total. All this was valuable information that needed to be preserved and transferred to the new system so that it would be available to a large number of users by the end of the project.

Requirements

Technical

- Seamless realization of a total of ten interfaces, including SAP ERP, Outlook, Service System, and Quotation Configurator. This was to simplify data maintenance and provide a comprehensive view of customer-related data

- Ensure real-time data availability at the parent company and the subsidiaries to enable sales managers to coordinate their activities efficiently and, if necessary, at short notice on the basis of the same data

- Mobile availability on laptop, tablet, and smartphone for field staff to enable them to access current customer data, opportunities, quotations, and activities at any time

- Adherence to country-specific security regulations, including privacy regulations, by operating with SAP cloud servers located in Germany.

Operational

- Ensure consistent database for the intensive exchange of technical know-how between parent company and subsidiaries

- Elimination of parallel data maintenance in different systems through efficient data maintenance in a single system with automatic synchronization

- Improved lead and opportunity management for efficient follow-up and development of trade fair leads and sales opportunities

- Ensure a high level of user acceptance through intuitive operating procedures for the new system, among other things

- Holistic view of the TRUMPF products in use at all times

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Solution

To define the requirements for the new system, the project started with an analysis of the existing CRM solution – including input from the subsidiaries. This showed that campaign, lead, and opportunity management as well as order processing were inadequately mapped and efficiency was therefore reduced. The To-Be processes were devised in further workshops involving staff from IT, Marketing, and Sales, including both in-house and field staff as well as the Head of Sales. The participants determined the requirements that the new system needed to fulfil, identified the instances when it is important to choose standard functions, and decided on the milestones to be achieved by certain deadlines. Replacing the legacy CRM system – and thereby harmonizing the customer data – was to be completed within 24 months by the step-by-step implementation of SAP Hybris Sales Cloud at the parent company and the subsidiaries. Data migration was divided into an initial migration and regular delta migrations for newly added data. Within the CRM system, a clear mapping of the registered products as well as all e-mails, appointments, companies, contacts, and the associated opportunities was ensured. Intensive coaching by project partner Sybit and internal change management campaigns made for a high level of user acceptance and a smooth project flow.

[The data migration was a real challenge – but we managed it successfully with Sybit at our side. As a rule, companies intending to introduce a new CRM system should consider a 'minimum viable product' approach if the circumstances allow.]

Peter Schulz, IT-Project Manager CRM, TRUMPF Group
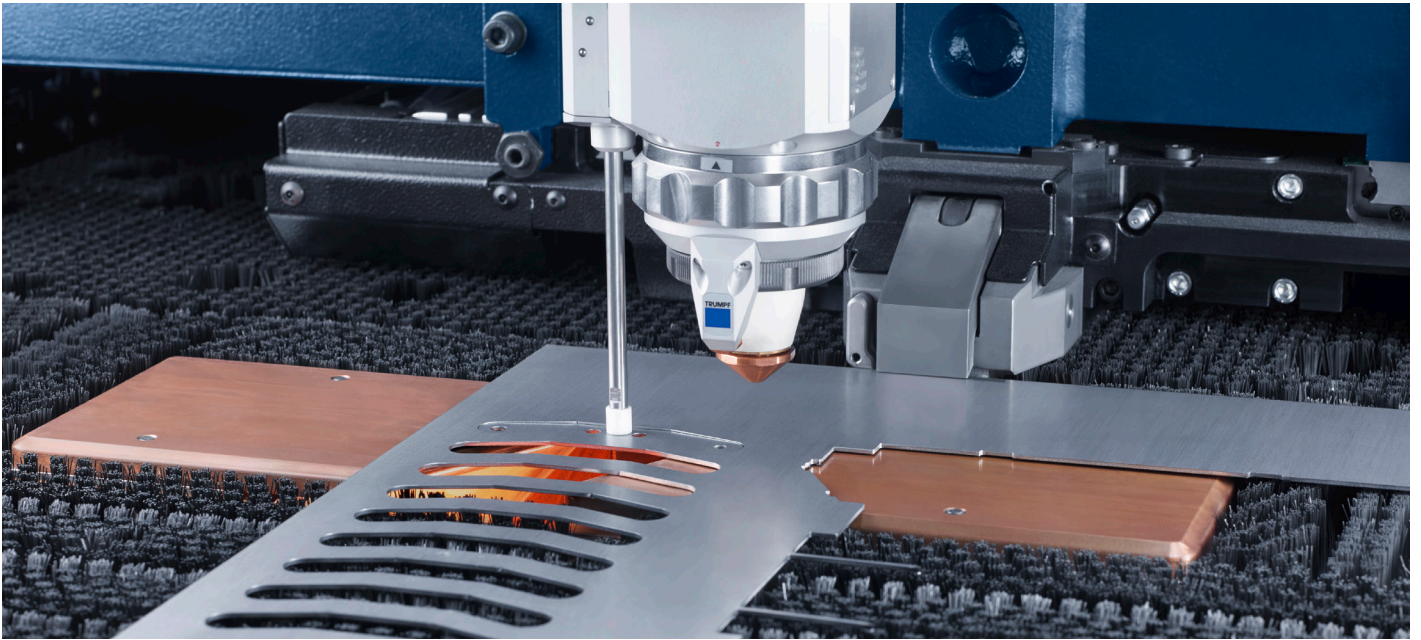
Requirements

- Data migration of over 7 million pieces of data

- Planned roll-out to a total of 24 countries for some 1,650 users

- Joint data usage in real time: realization of ten interfaces and well laid-out mapping of the information in the CRM

Requirements Change Management

The legacy system was to be replaced after 20 years of intensive use. To make sure that the workforce would be on board with adopting the new solution, emphasis was placed on usability. In addition, the operating department provided key user training and supported the change process through an internal communication campaign: webinars and exercises were made available for streaming, staff received information via the intranet, FAQs and training documentation were made available, and the matter was reported on in the company magazine. And it paid off: the first members of staff in the pilot countries of Switzerland and Taiwan are now using SAP Sales Cloud on a daily basis.

[*My strategic recommendation for such a project: get on with it, complete it speedily, and find the right partner – preferably someone like Sybit.
We found them very receptive to our suggestions. This allowed a solution-oriented exchange to develop that advanced the project significantly.*]

Magdalena Blisch, Head of CRM Department, TRUMPF Group

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TRUMPF Group

The high-tech company TRUMPF offers manufacturing solutions in the fields of machine tools, laser technology, and electronics. The company promotes the digital networking of the manufacturing industry through consulting as well as platform and software offerings. TRUMPF is a technology and market leader in machine tools for flexible sheet metal processing and industrial lasers. In 2016/17, the group generated sales of EUR 3.11 billion with a workforce of some 12,000. With more than 70 subsidiaries, the group is represented in almost all European countries, in North and South America as well as in Asia. Production plants are located in Germany, France, the UK, Italy, Austria, Switzerland, Poland, the Czech Republic, the USA, Mexico, China, and Japan.

Sybit

Sybit is the ideal partner for integral customer experience management. As an SAP Gold Partner and one of the top 20 digital agencies in Germany, Sybit develops solutions that map all end-to-end processes in the customer journey. With its head office in Radolfzell near Lake Constance, Sybit employs over 200 people. Over 300 corporations and globally active medium-sized companies trust in the expertise of the SAP consulting firm.

Do you have further questions? We look forward to your contact enquiry.

Jennifer Bertsche
Inside Sales Executive
+49 (0)7732 9508-2000
sales@sybit.de

Sybit GmbH
St.-Johannis-Str. 1-5
D-78315 Radolfzell
www.sybit.de

We would be happy to support you from the first steps before launching a project all the way through implementation, integration, training and maintenance. Get in touch with us – for a successful project.

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CS-17Q4-004 | Date: 11.10.2018

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