



## A SUITABLE CRM SOLUTION

SAP Sales Cloud in Swiss Mechanical Engineering



# WALTER MEIER

solutions that fit

### Customer

- Walter Meier (Fertigungslösungen) AG
- Year of foundation: 1937
- Headquarters: Schwerzenbach/Switzerland
- 80 employees, 16 of them in the sales department

### Industry

- Machine and tool trading

### Challenge

To prepare its sales department for a secure future, Walter Meier was looking for an advanced CRM solution that can also be used on the move. This application was to be integrated into the SAP landscape and map the different business units. The greatest challenge within the project was data formatting.

### Solution

- SAP Sales Cloud with ERP integration

### Benefits

By setting up SAP Sales Cloud including rights system, ERP and Outlook integration, the sales managers now use a consistent and centrally managed system with improved data quality and clear responsibilities.

**With SAP Sales Cloud, a large Swiss machine and tool trader has found an optimal CRM solution to support its field sales force and sales management in particular in sales and customer support.**

For the manufacturing solutions of Swiss enterprise Walter Meier, the following principle applies: They have to be suitable and exactly tailored to the customer's requirements. To achieve this, the provider takes care of all customer concerns, from consulting, project planning and manufacturing up to training courses and service - including regular support provided by the field sales force.

These activities and the required efforts need to be well planned. After the "manufacturing solutions" division had been separated from the Walter Meier group and become independent in 2015, the adjustment of the IT infrastructure and the improvement of the Customer Relationship Management system (CRM) were at the very top of the agenda. At that time, SAP ERP was already in use; however, in quotation and order creation, Excel lists were still used in part. For the CRM area, a separate software solution was available, which did

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no longer meet current requirements. A more differentiated classification of customers according to sales volumes and potentials could not be mapped with this solution and, furthermore, essential reporting functions were missing. Sales and service management were to be supported in a better way by means of increased transparency as well as easy and clear evaluation options.

## Fast response required

In the midst of this planning stage, the enterprise was struck by a hacker attack in 2019. After the cyber attack, data had to be quarantined for weeks and the CRM database would have had to be reinstalled - at the respective costs. In this situation, the Swiss enterprise decided to immediately change over to a new system. It was seeking advice from its long-standing SAP partner, FIS Informationssysteme und Consulting GmbH. FIS had already implemented the separation of the ERP system from the previous corporate structure for instance. For customer relationship management, the FIS experts presented SAP Sales Cloud to Walter Meier, optionally complemented by SAP Field Service Management. Herbert Sohm, Head of Sales Development at Walter Meier, was convinced by the cloud-based and intuitively operated CRM solution: "It was exactly what we were looking for: a state-of-the-art CRM system, which could be integrated very well into the existing SAP landscape at the same time. Furthermore, the system is flexibly adjustable - minor changes can even be made by ourselves as users. This opens up completely new possibilities."

As a consequence, the decision for SAP Sales Cloud had been made. Due to a long and trustful collaboration, FIS was also entrusted with the implementation and Herbert Sohm assumed internal project management. The project kickoff took place as early as in January 2020.

## Requirements: a classic CRM system for mobile use

The four corporate divisions were to be mapped in the new CRM system: machine and tool trading, tool and mold manufacturing as well as training machines. This had to be considered and the rights management had to be adjusted

accordingly. On the whole however, a classic CRM system was required, which is primarily used by the field sales force: all customer data, sales activities, appointments, reports including image data and attachments summarized on one platform, available on the move and in the offline mode. Selected data had to be synchronized with the ERP system and the calendar data with MS Outlook. Overview and evaluation functions were important for assessing the sales opportunities. Processing status and occurrence probability were to be visible as well as evaluations according to key figures and classification of customers. The data quality was to be ensured by respective mandatory fields. "With only a few adjustments, all requirements could already be mapped in the SAP standard version," Mirko Dechant, project manager at FIS, explains.

## Challenges: data structure and distance training course

The challenges were in another area: The data required could not simply be extracted and transferred, but first had to be summarized from the backup files, mainly in the form of lists, synchronized with the SAP master data and divided by sales structures. Respective internal knowledge was necessary for checking and synchronizing the data. As a consequence, the team around Herbert Sohm was facing a great deal of work at first. The partners at FIS were helping as much as they could - by providing a data matrix to be filled, converting the data into a format suitable for import and carrying out the duplicate check. Together, this hurdle could be cleared so that, as a result, clearly structured data was available for import into SAP Sales Cloud. Close coordination between the partners as well as regular weekly telephone conversations on the project status provided assistance.



In spring 2020, Walter Meier and FIS were facing the next challenge: Due to the Corona pandemic and the associated lockdown, no physical meetings were possible any longer all of a sudden; however, meetings and training courses were still to be held. "From the beginning, it was important to us to win our internal users for the new system," Herbert Sohm points out. "For this purpose, training courses and feedback conversations had been scheduled." In this case as well, a solution could be found: The key user training started as early as during the testing phase in the form of virtual meetings. The key user teams trained other employees; feedback and questions were returned to FIS and discussed afterwards. In parallel, the project team worked intensively on the technical implementation.

In mid-October 2020, the new system was put into operation as planned. The fact that the project could be implemented that fast was due to the excellent collaboration and the commitment of Walter Meier, as Mirko Dechant stresses: "The project manager was consistently available for questions and decisions, which is absolutely crucial for such projects."

### **Conclusion: the right solution, the right partner**

The new CRM solution provides clear benefits: a consistent and centrally managed system, improved data quality and clear responsibilities. Even the differentiated customer classification with nine customer segments could be implemented as requested. The hardly dispensable, but also expensive field sales force activities can now be controlled in a much better way. It takes some time and a

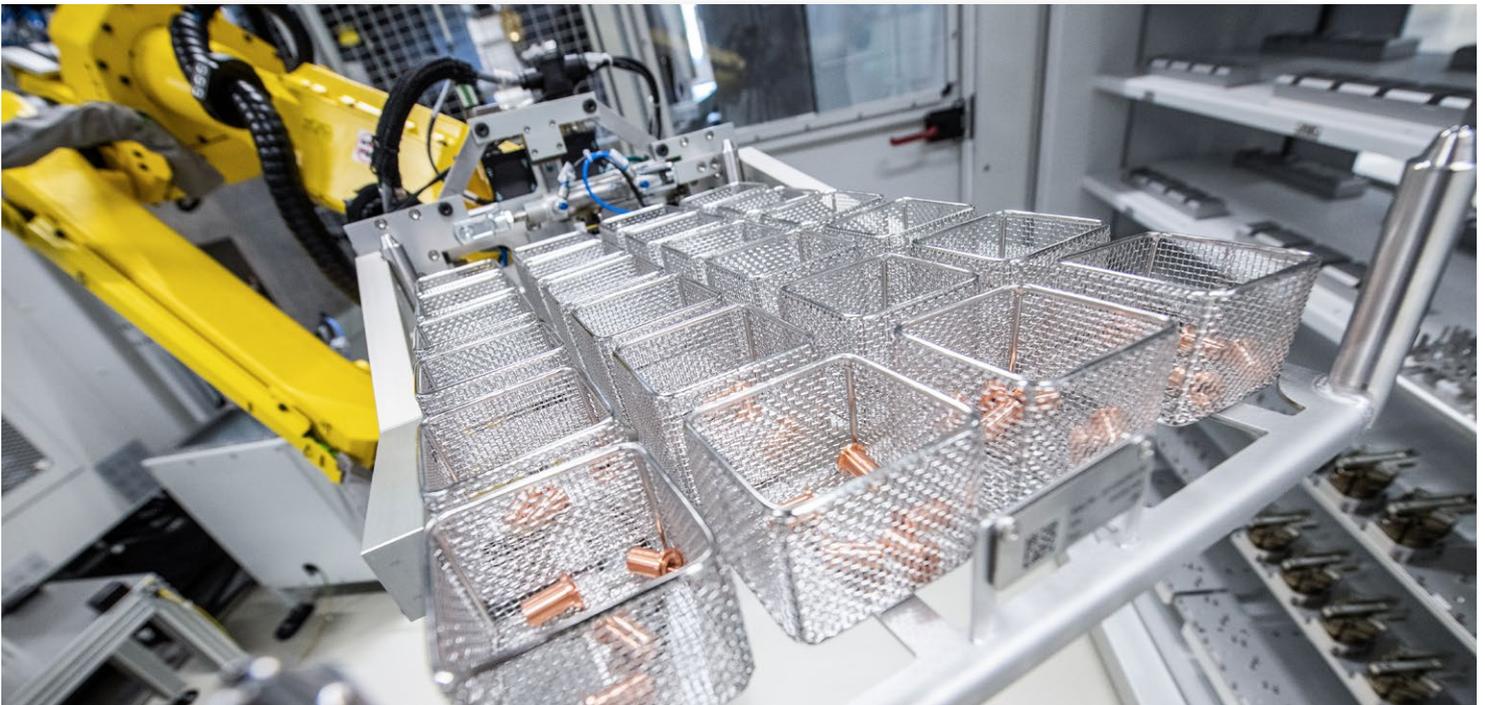
rethink until all persons involved can properly use this new transparency, but: "In the end, it also helps the individual field sales force employees use their own resources in the best possible way," Herbert Sohm explains.

After go-live, the campaign management was already implemented in the sales cloud: With a few clicks, sales managers can select addressees amongst their customers for specific e-mailings and newsletters, organize them in target groups and contact them. Within the system, the respective task for follow-ups by telephone is generated automatically and you can see, for instance, what customers have opened the mailing. Further evaluation options, such as lead tracking, are currently being planned.

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In the next step, the implementation of a reporting and of the customer service solution mentioned above, i.e. SAP Field Service Management in combination with SAP Service Cloud, will be planned. SAP Service Cloud also enables a more precise control of repairs and maintenance services via an integrated ticket system.



The Swiss company is convinced of SAP Sales Cloud and of FIS as a partner. This is particularly due to the fact that the solution is constantly further developed. "New developments and continuous improvements correspond to the spirit of the times. For us, it is the right system - with the right partner", Herbert Sohm points out.

# WALTER MEIER

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## Walter Meier (Fertigungslösungen) AG

Swiss precision with 80 years of tradition: Walter Meier accompanies customers on their way to demanding manufacturing success. With know-how that is always at the cutting edge and with experience that has grown over decades. We find the best solution independent of technologies and manufacturers. We focus on only one thing: the requirement - from the analysis of the needs and the development of the solution to the training and commissioning of the machines. At Walter Meier, every move has fulfilled a clear mission since 1937: We want to not only meet, but far exceed our customers' expectations with complete solutions made to measure.



## TOGETHER WE ARE STRONG

Together, Medienwerft and FIS - two companies of the FIS group and certified SAP partners – cover the entire range of SAP Customer Experience. They offer the all-in-one package for marketing, sales and distribution, service and e-commerce: from consulting, conception and design to technical implementation.

FIS Informationssysteme und Consulting GmbH is the roof of the FIS Group. FIS mainly focuses on individual SAP consulting and the execution of SAP projects. In the area of Customer Experience, FIS is the expert for SAP processes and their technical integration.

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Medienwerft GmbH is one of the most experienced internet agencies in Germany. Its core competence is the development of e-commerce applications and digital communication concepts for brands. This makes Medienwerft an expert for UX design, e-branding and web shops.

Together, FIS and Medienwerft are strong partners for SAP and Customer Experience.

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