Humanetics Innovative Solutions uses SuiteCRM to increase visibility, consistency and collaboration

CUSTOMER NAME:
Humanetics Innovative Solutions

CUSTOMER DETAILS:
Offices in US, Europe, China, Japan, India

ORGANISATION TYPE:
Privately Held Manufacturing Company

EMPLOYEES:
501 – 1000 Employees

SUMMARY OF KEY BENEFITS:
- Global visibility of customer contacts and activity management by creating a central repository of all customer information.
- Improved efficiency and visibility with standardized processes for Quotations and Customer Service
- Running targeted multi-channel marketing campaigns to help obtain greater customer insights.

Summary of Aims

Global CRM Implementation to introduce a single repository for customer contact data to increase visibility, consistency and collaboration. The three objectives of the project were to;

- To obtain global visibility of customer contacts and activity management by creating a central repository of all customer information.
- Improve efficiency and visibility whilst standardising processes for Quotations and Customer Service
- To run targeted multi-channel marketing campaigns to help obtain greater customer insights.

The Challenge

All customer data was held in their ERP system which there was limited access to and lacked relationship management capabilities. There were no systems to monitor customer satisfaction or provide marketing benefits. The customer had not previously implemented a CRM system in the past so user adoption as key to the project being a success as well as a consultant who could guide them through the process.

“The SalesAgility team has surpassed our expectations with swift communication channels and great results resulting in a smooth deployment of the SuiteCRM product.”

MARK BROWN, TECHNICAL SALES SPECIALIST AT HUMANETICS

The Solution

The customer engaged SalesAgility as their CRM consultant of choice to deliver SuiteCRM. By implementing SuiteCRM Humanetics Innovative Solutions created a single repository for contact data increasing visibility, consistency and collaboration.

The initial requirements were captured through a three day on-site workshop facilitated by SalesAgility in Detroit, US. During this workshop the CRM features and acceptance criteria were established.

Once agreed SuiteCRM was customised to fit the needs of Humanetics Innovative Solutions including:

- Implement a three level Account hierarchy including record roll-up feature. Establish restricted editing and validation rules based on Account Status. Implement different Account workflows depending on Account Grade.
- Retrieve new Accounts, Quotes, Orders, Invoices, CCRS, RMAs, Product Categories, Currency Rates and Contracts from the ERP system. This included interfacing with six different ERP databases for different Business Units.
- Embed sales processes into Opportunity module including different stages per business unit, triggering workflow at different stages and dynamic validation depending on Opportunity stage.
- Implement 12 month forecast report, sales summary report and fiscal year view reporting using a combination of CRM and ERP data.
- Integration with OTRS support ticket tool for technical issue history.
- Enhanced Campaign management tool to include approvals and social media metric recording. Included Event management features allowing expenses to be recorded and Event ROI reports to be generated.
- Integration with Licence DB to retrieve licence information and trigger CRM processes for renewals.
- Creating and sending surveys from within SuiteCRM. Collecting results and triggering workflow depending on responses. Includes triggering a back end shipping processes when required.
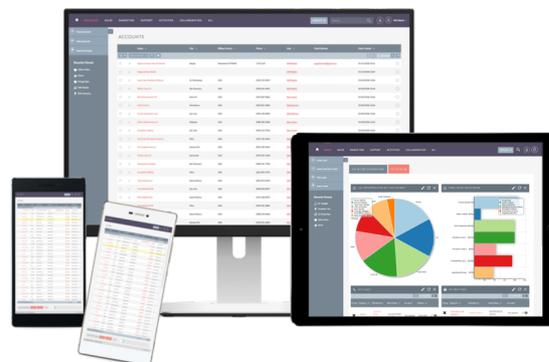
The implementation of SuiteCRM took three months to complete after which SalesAgility delivered end-user training as well as on-going retained development and consultancy services.

"Jim and the SalesAgility team have been great to work with. They are always quick to respond to our requests in customizing the SuiteCRM product to our specific needs."

HUMANETICS
Innovative Solutions

KATIE FORAN, SALES DIRECTOR AT HUMANETICS

About SuiteCRM

SuiteCRM is the world's most popular open source CRM with over 800.000 downloads and an estimated 4 million users world wide. Main features include sales, marketing and service modules. SalesAgility is the driving force behind SuiteCRM and the logical option for enterprises and organisations looking for professional SuiteCRM services, such as migrations, consulting or training. SalesAgility offer with SuiteASSURED a total care package for SuiteCRM.
For more info, as well as a free demo, check out: www.suitecrm.com