Case Study — Industrial Equipment Manufacturing

Country: China
Industry: Industrial Equipment Manufacturing

Customer Profile:
The Sunward Intelligent Equipment Group (the Group), founded in 1999 and based in Changsha, with the Sunward Intelligent Equipment Co., Ltd. (Sunward, stock code: 002097) as its core enterprise, has a number of subsidiaries in many Chinese cities, including Changsha, Wuxi, Huaiabei and Tianjin, and in Europe. Ever since its establishment, the Group has gradually built itself into an international conglomerate with construction machinery as core business, proprietary intellectual property, and certain influence both at home and abroad. In 2011, it succeeded in ranking among the Top 50 global construction machinery manufacturers.

Background
As Sunward’s business has been expanding rapidly with increasing customers and product series, the managements become aware of the importance for Sunward to take advantage of CRM to improve its marketing and managing levels. With business growing robustly, the first-generation CRM system originally implemented by the company can no longer competently carry the operation of its marketing management. The existing system has below deficiencies:

- Lack of effective customer management
- Incapable of sales process management
- Incapable of effectively managing sales and service teams
- Difficult in account management
- Inefficient management of spare part
- Inefficient after-sales service management
- Incapable of effective market analysis
- Low scalability of the original system, thus incapable of being integrated with other corporate systems

Sunward adopts Microsoft Dynamics CRM 2011 to Improve Corporate Sales, Marketing and Service Management

Through Microsoft Dynamics CRM 2011, Sunward improves its corporate informatization comprehensively. Each module of the solution fits in with the customer’s day-to-day business processes, and optimizes the operation of corporate marketing systems of customer, sale, market and service.

Project Background:
So far, Sunward has not only established many subsidiaries nationwide and in Europe, but also engaged a large number of distributors to provide customers with support in marketing and service. In addition, it has also implemented the first-generation CRM system to manage its sales and service operations. However, with growing business, Sunward is increasingly challenged by the following issues:

Lack of effective customer management
A uniform platform is needed for managing customer information. The original system is incapable of managing potential customers. Besides, there is a lack of systematic customer management and care for key customers;

Incapable of sales process management
The existing system does not take business opportunities and sales leads into management. For key projects, managers are unable to get aware of the progress of a project and to give advice and support. No effective forecast can be made based on a project, nor can the feasibility of forecast realization be judged;

Incapable of effectively managing sales and service teams
Business personnel and service engineers are distributed in various regions of the country, so that the management cannot learn about the business personnel, their work circumstances and progress of projects, etc.;

Difficult in account management
When payments from a customer are of bank mortgage or on a monthly basis, the automatic alarm on the customer’s credit line just cannot work. The company’s risk control system cannot get all information of accounts in time, so it cannot carries out effective management on credit and debt. Therefore, risks exist on account management;

Inefficient management of spare part
The headquarters cannot know about a dealer’ inventory of spare parts clearly and timely. The efficiency is low for old pieces to be returned to factories for repair. The repair efficiency and customer satisfaction are impaired as related information cannot be shared with the logistic system and the status of spare part release/receipt is not transparent;
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Solution

After long-term study and comparison, Sunward finally made its decision to adopt Microsoft Dynamics CRM 2011. Shanghai Wicresoft Co., Ltd., as a joint venture and gold partner of Microsoft, has joined hands with Microsoft in launching the industrial equipment manufacturing solution, which includes 6 main modules, i.e. market management, sales management, service management, spare part management, decision analysis platform, and mobile CRM, all of which are adapted to the characteristics of Sunward’s sales and marketing management.

Business Benefit

Through Microsoft Dynamics CRM 2011, Sunward improves its corporate informatization comprehensively. Each module of the solution fits in with the customer’s day-to-day business processes, and optimizes the operation of corporate marketing systems of customer, sale, market and service. Meanwhile, by means of the cell-phone intelligent mobile terminal developed first by Microsoft, business personnel and service engineers can just use their cell phones to timely feedback and issue data of marketing and service, thus greatly improving corporate effectiveness.

- Optimized sales management process and raised sales efficiency
- Improved efficiency of spare part operation, and lowered spare part inventory
- Realizing a closed loop of service and improving service efficiency and customer satisfaction
- Helping decision makers carry out supervision and decision analysis more effectively
- Consummating system deployment to ensure data security

Inefficient after-sales service management

The original CRM system can only record service events when they are over, and cannot implement effective management based on service processes such as service contracting, customer complaint processing, service planning, service distributing, and service reporting, etc., hence relatively low timeliness and effectiveness. The integration with the call center is not available, so data is blocked and the customer service efficiency and professional degree are impaired;

Incapable of effective market analysis

The collation and analysis of market data can only rely on manual methods, which require a lot of work force and can neither utilize rich analysis/demonstration methods nor realize multi-angle dynamic analysis;

Low scalability of the original system, thus incapable of being integrated with other corporate systems

The original system is inflexible in secondary development and uneasy to modify and extend, thus being inadaptable to the company’s requirements of development. Furthermore, it cannot be integrated with the company’s current systems of ERP, OA, call center and GPS, etc. for sharing data.

Solution:

Shanghai Wicresoft Co., Ltd., as a joint venture and gold partner of Microsoft, has joined hands with Microsoft in launching the industrial equipment manufacturing solution, which includes 6 main modules, i.e. market management, sales management, service management, spare part management, decision analysis platform, and mobile CRM, all of which are adapted to the characteristics of Sunward’s sales and marketing management;

Sales management

Covering customer management, pre-sales project management, contract management, payment management, plan management, personnel and cost management, and mortgage management, it is based on a common platform to implement customer information maintenance and customer care, and to query in a comprehensive viewing angle about a customer’s information of key contact person, sales lead, contract and delivery, and customer service, etc., to query in real time about sales lead and contract progress, and to check and analyze sales status of shipment, payment and plan achievement;

Market management

Including functions such as market information collection and analysis, product market feedback, market activity planning/approving/implementing, and promotion material management, it realizes the process control of market activities and provides various market analysis data;

Account management

It is adapted to Sunward’s account management process, allowing managers to get aware of the account status at any time. And the system will automatically remind users of accounts receivable and customer credit line;
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About Microsoft Dynamics CRM

Customer relationship management (CRM) can help reduce costs and increase profitability by organizing and automating business processes that nurture customer satisfaction and loyalty. CRM delivers a holistic view of each customer that enables client-facing employees to make expedited and educated decisions about strategic efforts in the sales, marketing, and customer service fields.

For more information about Microsoft Dynamics, please visit: http://www.microsoft.com/china/dynamics/crm/

Service management

Integrated with the call center, it realizes a closed loop of service contracting, customer complaint processing, service planning, service distributing, service reporting, and case managing. Through integration with mobile handset terminals, site service engineers can use CRM mobile clients to enter the CRM system at any time for feedback and tracking of work progress. It can also utilize SMS to carry out an on-site customer satisfaction survey. It has realized timely effective analysis on service progress, service performance and product quality; through integration with GPS, it helps users get aware of the location of every device, providing convenience for device management;

Spare part management

The system integrates spare part management with the ERP and shipment system, allowing the headquarters to get aware of distributors’ real-time inventory and assist them to implement inventory management. It includes managements of spare part plan, spare part sales, parts returned based on three guarantees (for repair, replacement or return of faulty products), spare part shipment, spare part acceptance, and old parts returned, and helps grasp and analyze in real time the status of spare part inventory, spare part turnover, and central repository spare part fulfillment. Therefore the company can implement better spare part plan and reserve management;

CRM mobile application

This adopts a uniform ISP operator to provide the Group with mobile communication and 3G network services, with communication cost optimized. The 3G network or traditional SMS and email technologies are utilized to realize timely feedback and issuance of data of marketing and service business, to improve the efficiency of management. And the efficiency of information exchanges is raised through advanced smart mobile terminals, integrated with the Group’s systems of email, OA and ERP, etc.;

Marketing decision analysis

Through business intelligence tools, the modeling for data of CRM and ERP systems is implemented, with dynamic, multidimensional and graphical analysis reports provided to help managers make decisions timely and effectively;

System integration

A seamless integration with call center, SMS, GPS, OA, and email is realized. For business management and control systems, such as ERP and SCM, data interaction and process integration are realized.

Business Benefits:

Through Microsoft Dynamics CRM 2011, Sunward improves its corporate informatization comprehensively. Each module of the solution fits in with the customer’s day-to-day business processes, and optimizes the operation of corporate marketing systems of customer, sale, market and service. Meanwhile, by means of the cell-phone intelligent mobile terminal developed first by Microsoft, business personnel and service engineers can just use their cell phones to timely feedback and issue data of marketing and service, thus greatly improving corporate effectiveness.
Optimized sales management process and raised sales efficiency

The system carries out a 360-degree management on customer resources, and timely records archival information of potential or formal customers. Through effective management on business opportunities and sales leads, the managers can learn about the progress of every project at any time and give advice and support, so that sales resources can be effectively utilized and the ratio of successful sales orders improved;

Improved efficiency of spare part operation, and lowered spare part inventory

The operation of spare part management is completely based on the system. The maintenance / requisition history, inventory, and supply rate, etc., can be based on for preparing a spare part plan and controlling the inventory of spare parts and the return of expired parts to manufacturer. This secures timely supply of spare parts and meanwhile reduces spare part inventory and sluggishness;

Realizing a closed loop of service and improving service efficiency and customer satisfaction

The service management features a closed loop operation, with the entire process monitored. The supervision on service performance indicators, such as service effectiveness and timeliness, and the analysis on product quality indicators, such as market feedback rate and fault distribution, are realized, raising the efficiency and speed of services, and laying the foundation for the improvement of product quality and supplier performance;

Helping decision makers carry out supervision and decision analysis more effectively

Various models are set up for macro-environment analysis, competitor analysis, sales analysis, service analysis, and quality analysis, etc., helping managers monitor the achievement status of various corporate indicators and analyze decisions effectively.

Consummating system deployment to ensure data security

The VPN and double-room modes are adopted, which solves network transmission problems and the issue of difference between northern and southern regions and allows fast access nationwide. In addition, the hot standby mode for disaster recovery has been used to safeguard data security through the data disaster emergency response mechanism.