

CASE STUDY



Zwick / Roell

Manufacturing

Microsoft Dynamics CRM

 **AlfaPeople**



“Increase of worldwide productivity and global overview”

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“Our positive experience in partnering with AlfaPeople in the past has been repeated with this project. With Microsoft Dynamics CRM, we now have a 360o view of our customers.”

Project scope and business needs

Zwick GmbH & Co. KG is a family business with an illustrious heritage spanning over 160 years of operations. It produces the highest-quality of materials and component testing machines, supplying its tailor-made machines and equipment to the most demanding research, development and quality assurance professionals in over 20 industries around the world. It manufactures fatigue and hardness testing equipment, pendulum impact and melt flow index testers, as well as automated testing systems for a wide range of applications.

With over 1250 employees and production facilities in 15 countries including Germany, Austria, Great Britain, France, Spain, USA, Brazil, Turkey and in Asia - plus agencies in 56 countries - the Zwick name is synonymous with the highest product and service quality. This quality has earned the organisation a leading position in the marketplace, particularly in

the areas of static testing. Its extensive customer base has trusted it to supply them with superior testing equipment for many years, leading to steady growth for the business.

Relationships with a large number of customers spread throughout the world can be a significant sales, marketing and operational challenge. Zwick’s Sales & Marketing department was already using a CRM solution in the form of Microsoft Dynamics CRM 2011, which had been deployed by its partner, AlfaPeople, to oversee marketing campaigns and activities. The AlfaPeople team had also developed an efficient data exchange between Dynamics CRM and Microsoft Dynamics AX, which was used elsewhere within the company. It was a logical step on for the business to roll out the powerful and customisable capabilities of Microsoft Dynamics CRM, beyond Sales & Marketing, to service-related departments and their staff, including in contract management, dispatching, resource planning and field service.

The ambition was for Zwick to efficiently gather, store and interpret customer-related information and management data from the Sales & Marketing and Service functions into one database. This would make reporting and analysis easier and establish an ongoing holistic view of every customer, sourced from one technology application.



“Working with AlfaPeople on this project was very pleasant. From concept design through to implementation, we knew we were in capable hands. The observations and processes that we raised were registered, critically analysed and integrated reliably and on time.”

Jochen Niederberger, Service Manager at Zwick

Solution

Zwick enjoyed an excellent experience working with AlfaPeople when the team implemented and integrated Microsoft Dynamics CRM in the Sales and Marketing department. As a result the organisation decided to brief AlfaPeople to upgrade and extend the scope of Microsoft Dynamics CRM to the 2015 edition and to the wider group of customer and service functions and create that full view of every customer. As Martin Schilling, Overall Project Manager, CRM, at Zwick said: “Our positive experience in partnering with AlfaPeople in the past has been repeated with this project. By combining Sales & Marketing and Service with Microsoft Dynamics CRM, we and our partners around the world, now have a 360o view of our customers.”

Before arriving at that point, the AlfaPeople team first had to address two key legacy operational requirements in the Service area. The first was that the Microsoft Dynamics AX platform in use was built in a German version, which limited the ability for many of Zwick’s international partners to gain access and use information held in the system. On a day-to-day level this meant that Zwick employees in Germany produced the quotes and sent them on, which involved unnecessary costs and resources.



The new solution needed to offer multi-language abilities to combat this. Secondly, the existing schedule board used in Microsoft Dynamics AX didn’t allow dispatchers to use a ‘drag and drop’ capability, which led to less information being added to each work order. The customised project implementation of Dynamics CRM by Zwick was named ‘PULS’, and was split into two phases. Phase 1 involved upgrading the existing Sales & Marketing module. The target was to enable the sales department to manage lead generation opportunities and offers, in order to improve leads and boost sales, as well enhance the company’s marketing capabilities. Phase 2 was called ‘PULS for service’, incorporating the service functions and it also included Zwick’s international partners and their 600 employees in the scope of work.

“Congratulations AlfaPeople! Rarely have any of our projects been executed as smoothly and painlessly throughout every stage as this one.”

CEO, Dr. Jan Stefan Roell

The live application now supports and tracks all kinds of customer activity and customer enquiries (including meetings, tasks and document processes) as well as logging activities internally between employees. A more sophisticated schedule board includes ‘drag & drop’ functionality, making planning and work orders more effective and less time-consuming. A significant reduction in the length of time required to complete each service task has been achieved, thanks to the advanced customisations available in Microsoft Dynamics CRM.

Benefits

Customer transparency

Thanks to Microsoft Dynamics CRM, the Sales & Marketing and Service departments are now able to build and work with a complete overview of Zwick’s customers in one application. This system architecture has enabled all employees who have customer-facing roles to access a full overview of each customer anywhere, anytime. By integrating all customer-related data into one database, reporting and process control is also much more transparent and easy to achieve.

Effective service processes and interfaces

International partners can use and work within the same application as Zwick employees, which has reduced the time, budget and resource previously allocated to produce service quotes and handle work orders. The new scheduling functionality provides an advanced service overview and has enhanced resource planning capabilities.

Utilising the potential of cloud technologies

Zwick’s new solution is based on advanced modern cloud technology and built in HTML5. Both of these make future extensions and developments easier to plan, budget and implement and as the number of licence fees now required have been reduced, it’s a more cost-effective outcome for the business. The last word goes to Zwick CEO, Dr. Jan Stefan Roell, who said: “Congratulations AlfaPeople! Rarely have any of our projects been executed as smoothly and painlessly throughout every stage as this one.”

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