



KOCH AIR SALESFORCE IMPLEMENTATION: INTEGRATION OF SALES/REPORTING SYSTEMS

ORGANIZATION

Koch Air is an industry leader as one of the oldest Carrier distributors providing commercial and residential HVAC equipment in North America. They also have partnerships with several product lines that manufacture HVAC-related products, parts, and supplies for residential needs through commercial and industrial labs. Koch Air services the Midwest from Indianapolis to St. Louis and South to Louisville from nine convenient locations. Their 80+ years of experience make Koch Air an expert in providing their clients the tools for business success, from technical support to marketing strategies.

CHALLENGE

Koch Air recognized the need for a solution for their Commercial Sales Division, as the sales group was run primarily on a set of disparate Excel Spreadsheets. All quotes, sales reports and even information from Carrier came to their salespeople via spreadsheets. They had limited access to their Prophet 21 (P21) system that contained all order entry information. Additionally, Koch Air has nine branches; each branch ran its own set of spreadsheets. To further complicate the situation, it was possible for customers and salespeople to span multiple branches, resulting in a fragmented view of customers, orders and inventory needs. Altogether, it was very time-consuming to find needed information, which adversely impacted the success of sales calls, designing systems processes, customer support, and overall value.

SOLUTION

XTIVIA was engaged to help determine the best solution; Salesforce was the choice for Koch Air’s company-wide CRM. The initial plan tackled the commercial sales division first; the residential sales is a Phase 2 implementation. The project involved pulling all sales-related data into one central database to eliminate most of the spreadsheets as well as to integrate the Prophet 21 (P21) system information into Koch Air’s new Salesforce sales information system.

“The XTIVIA-Salesforce solution is very mobile-friendly and allows our sales team – primarily our outside sales team – to walk into any customer sales meeting more prepared and ready to roll in talking about their projects. This CRM pulls data from all our various sources into one single application, accessible by any device.”

– Doug Howery, Vice President of Commercial Sales, Koch Air

BUSINESS RESULT

Reliance on manual processes and spreadsheets is greatly reduced, saving staff time and frustration. The time it takes from customer commitment to the date the factory receives an order has been compressed, decreasing the need for customer support and increasing the value Koch Air provides customers. Salespeople now have information at their fingertips via Salesforce and its Mobile Platform:

- Account and Contact info, including credit history and available credit updated hourly.

BY THE NUMBERS:

- 80+ Years in Business
- \$60 Million Dollars Annually in Commercial Sales
- 4 Branches and 9 Locations Total

KEYWORDS

Customer Relationship Management, Equipment Distribution

SOFTWARE

Salesforce





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BUSINESS RESULT (CONTIINUED)

- Project information on each project including all the bidders for each project.
- Order Information down to the order line item updated hourly.
- Nightly updates from the Carrier system integrated into the Koch Air Salesforce system.
- Product inventory information updated hourly on inventoried products.

The entire project/order/credit workflow has now been automated to the point where order entry and credit no longer rely on hard copy information for processing. Management and Sales now have a list of interactive reports and dashboards showing how each salesperson, branch or the company as a whole is doing daily, weekly and year-to-date. Koch Air has taken advantage of Chatter within Salesforce to reduce the number of overhead communications previously required.

"I don't expect them to ever leave our side; that's where the value is at over time with XTIVIA as our partner,"

- Doug Howery, Vice President of Commercial Sales, Koch Air.

XTIVIA OVERVIEW

XTIVIA has established a proven reputation as a company that delivers leading-edge IT solutions and technology support for our clients' specific requirements, regardless of project complexity. Our service areas include Application Development, Business Intelligence, Customer Relationship Management, Data Warehousing, Database Support and Management, Enterprise Information Management, Enterprise Resource Planning, Software Licensing, and Digital Experience Solutions. XTIVIA's success stems from a demonstrated ability to provide deep expertise via professional services, empowering clients to leverage their chosen technology successfully, competitively and profitably. If you can imagine the business outcome, XTIVIA can create it with technology. XTIVIA has offices in Colorado, New York, New Jersey, Missouri, Texas, and Virginia. <https://www.xtivia.com/>