

# Implementation of Infor CRM and MS SQL Server® for WATLOW®

## ORGANIZATION

Watlow® is a leading manufacturer of heaters, sensors, temperature, power and process controls, and control software. They provide their customers with process thermal system integration, custom capabilities, and engineering support, operating 12 plants that manufacture 26 major products with 105 categories and millions of subcategories.

## CHALLENGE

Watlow's product line experienced rapid growth through an aggressive acquisition strategy. However, their old-fashioned manual sales processes were hindering sales growth of the expanding product line. The lack of automation in sales was about to get compounded, as manufacturing implemented a new Enterprise Resource Planning (ERP) system. That's when Watlow chose to implement the Infor CRM Sales Information System using Microsoft's SQL server® as a foundation to provide a totally integrated sales automation solution for their sales team.

Watlow's decision to implement an automation system was driven by three primary factors:

**SALES GROWTH WAS SLOWING** - Watlow experienced tremendous growth both by expanding their product line and through acquisition. They operate 12 plants that manufacture 26 major products with 105 categories and millions of sub-categories. Prior to implementing the Infor CRM solution, each plant was responsible for managing its own line of products. But the sales team had a difficult task of selling an integrated line of heaters, sensors, and controls from multiple sources - what is known as the Full Thermal Loop.

**CUSTOMER-DRIVEN DEMAND FOR MORE INFORMATION, FASTER** - In this very competitive commercial marketplace, customers are expecting faster turnaround times in terms of information and orders. To be successful, Watlow had to find the opportunities, communicate them to various groups of people, then create a prototype or finished product very quickly. Their customers wanted virtually instant information on every aspect of their order. Watlow could never provide the rapid service expected with the manual system of calling six or seven plants, organizing the data into information, and then calling back the customer.

**NEEDED FRONT-OFFICE FOR ENTERPRISE-WIDE BUSINESS SYSTEM** - The final influence on their decision was the pending implementation of a new ERP system. The ERP system was not designed to supply front-office functionality, so it was important that whatever sales automation solution Watlow selected would interface with their Mac-Pac system.

For every sale with more than one type of part, each part would come from a number of plants. The order had to be configured and integrated at regional sales offices, then each part had to be manually split off and faxed to the appropriate manufacturing plant. Salespeople had no real way of determining the status of an order because this required multiple phone calls to determine the status of each part across the order before calling the customer. This inefficient use of time was slowing sales growth. We have given our salespeople one place to go to get all information regarding their customers and opportunities."

## SOLUTION

Watlow knew they needed to take steps to modernize their communications infrastructure. With an extensive set of requirements in place, Watlow identified and interviewed nine different sales automation vendors. After a thorough investigation, Infor CRM was selected because the product fit their company's needs and then company matched their expectations. Watlow determined that Infor CRM would be much easier to integrate with their existing back office systems, leading to reduced cost and complications for support. Watlow also determined that the user interface was the best. They have given the salespeople one place to go to get all information regarding their customers and opportunities.



## KEY COMPONENTS

### SOFTWARE

Infor CRM™



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## RESULTS

The outcome of their decision to select Infor® CRM offers a much-improved solution for their customers, their salespeople and ultimately for their entire organization. Now that Infor CRM is seamlessly integrated with Watlow's entire business system, they have critical company and contact information for all of their customers in just one place. This provides instant access of historical data and has dramatically reduced the amount of time it takes to answer a customer's request for information.

Most notably for the sales team, Watlow has increased the efficiency of each of their 100 salespeople. As a result, each is spending a minimum of four additional hours per week selling. The Infor CRM system provides 126 remote field users and 130 in-house workgroup users the ability to view data in any format they want. The user-friendly format for data analysis has captured the interest of the salespeople in the system and kept them using it. In addition, the salespeople are using perpetual forecasting and customer satisfaction surveys that go right into Infor CRM. Today, thanks to Infor CRM, it is possible for salespeople to see the entire relationship, and contact the customer with key information and history at their fingertips.

## XTIVIA OVERVIEW

Since 1992, XTIVIA has established a proven, global reputation as a company delivering cutting-edge professional solutions to our clients' specific requirements, regardless of the complexity of the projects. XTIVIA's success has stemmed from a proven ability to deliver quality professional services, allowing the client to leverage technology successfully, competitively, and profitably. XTIVIA has received additional awards this year from Liferay, CIO Review and Inc. 5000. XTIVIA has offices in Colorado, New York, New Jersey, Missouri and Texas.

## CRM OVERVIEW

XTIVIA's knowledgeable CRM team has more than 90 years of combined experience in customizing and integrating CRM systems for companies of all sizes, crossing all industries. We offer multiple CRM systems, an extensive list of enhancements and superior integration skills—all the necessary ingredients to empower your organization to dramatically improve the customer experience. Our industry-leading live support and certified CRM training add another dimension of excellence to our CRM offering, expanding our ability to deliver effective solutions and drive outstanding results for your organization.



Thanks to XTIVIA's Infor CRM solution, Watlow now has comprehensive customer information available with the click of a mouse. Each salesperson on their 250+ team has re-captured an estimated four hours per week of valuable selling time. Now, this may not sound like a lot initially, but it is equivalent to having about nine extra salespeople on the street in any given week.

-MIKE BUTTS, WATLOW SFA TEAM LEADER

