



## Case **Study**

Humanetics Innovative Solutions

## CASE STUDY

# Humanetics Innovative Solutions

Humanetics Innovative Solutions uses a CRM 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 standardised 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 was key to the project being a success as well as a consultant who could guide them through the process.

***"The Geeking Out team has surpassed our expectations with swift communication channels and great results resulting in a smooth deployment of the CRM product."***

MARK BROWN, TECHNICAL SALES SPECIALIST AT HUMANETICS

## The Solution

The customer engaged Geeking Out as their CRM consultant of choice. By implementing CRM, 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 Geeking Out. During this workshop the CRM features and acceptance criteria were established.

Once agreed the CRM 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 back end shipping processes when required.

The implementation of the crm took three months to complete after which SalesAgility delivered end-user training as well as on-going retained development and consultancy services.

*"Victor and the Geeking Out team have been great to work with. They are always quick to respond to our requests in customizing the CRM product to our specific needs."*

KATIE FORAN, SALES DIRECTOR AT HUMANETICS

### **About our CRM**

**Key features include sales, marketing and service modules. Geeking Out is the logical option for enterprises and organizations looking for professional CRM services, such as migrations, consulting or training. For more info, as well as a free demo, check out: [www.geekingout.net](http://www.geekingout.net)**