

# SUCCESS STORY



Ventilation, Control & Drive Technology | Microsoft Dynamics 365 | ZIEHL-ABEGG SE



## Microsoft Dynamics 365 in the Cloud: ZIEHL-ABEGG Optimizes Sales Processes

With the introduction of Microsoft Dynamics 365 Online, ZIEHL-ABEGG bundles the sales-relevant information of its 28 subsidiaries worldwide centrally on a modern and sustainable CRM cloud platform. The manufacturer of innovative fans and motors thus creates the basis for IT-supported and uniform lead and opportunity management across all locations. With the competent support of ORBIS AG, the implementation and rollout in all subsidiaries was completed within 14 months.



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Ventilators are indispensable in many areas including kitchens, bathrooms and stables as well as air conditioning, wind power, bio-heating and photovoltaic systems and in medical and device cooling technology.

## Innovation on a continuous basis

ZIEHL-ABEGG SE is located in Künzelsau, Baden-Württemberg and their quality products are used worldwide. They are a high-tech company with around 3,900 employees that generated sales of 540 million euros in 2017. ZIEHL-ABEGG is one of the leading manufacturers of axial, centrifugal and process air fans. In addition to ventilation technology, they are also active in the drive technology, control technology and automotive sectors. Their product range comprises around 30,000 articles.

### ZIEHL-ABEGG SE

Headquarters: Künzelsau (Baden-Württemberg)

Products: ventilation systems (including various fans) and elevator motors

Locations: 16 production plants, 28 company sites and 108 sales subsidiaries

Employees: 3,900 worldwide

Revenue 2017: 540 million euros

Website: [www.ziehl-abegg.com/de](http://www.ziehl-abegg.com/de)

ZIEHL-ABEGG operates worldwide at 16 production sites, 28 subsidiaries and 108 sales offices and sells its products in more than 100 countries. The company has always secured a leading position in the market by developing and selling innovative products. One example is quiet energy-saving ventilators, which also incorporate findings from the field of bionics.

## Customer focus

*„In addition to innovations, efficient sales processes harmonized across locations are of great importance for future market success“,* says Thomas Brommer, Export Sales Manager at ZIEHL-ABEGG SE. The introduction of the Microsoft Dynamics 365 Online solution for customer management supports this approach throughout the Group.

On the integrated cloud CRM platform, ZIEHL-ABEGG now manages customer data and sales-relevant information for its subsidiaries centrally in a single database. This creates the conditions for consistent and uniform sales

processes - especially in contact, lead and opportunity management.

## Introduced in only 14 months for 28 locations

ZIEHL-ABEGG chose to implement Microsoft Dynamics 365 Online because a Cloud-based solution could best address their requirements.

With the introduction of the new CRM platform, ZIEHL-ABEGG commissioned ORBIS AG, who have extensive know-how with regards to CRM processes in mechanical and plant engineering. This and the trusting cooperation of the internal project team with the ORBIS experts contributed to the fact that the implementation for the 28 locations was completed in only 14 months.

## A central hub for CRM processes

As a central data hub, the CRM enables the exchange of information between the individual subsidiaries and the company headquarters. *„This significantly improves communication and thus also CRM processes, which has a very positive effect on customer care“,* explains Thomas Brommer.



Energy saving ECblue – Axial fan

For example, as soon as a user enters project data into the solution in the course of the sales process, it is immediately available to the other subsidiaries.

#### **Ease of use convinces**

The extremely easy and comfortable use of Microsoft Dynamics 365 Online is another big pluspoint. The current 500 or more end users have quickly learned how to use the CRM application, also because it is similar to other popular Microsoft products.



*ZAwheel - Electric drive for commercial vehicles and buses*

Users also benefit from further simplifications and improvements. An Outlook add-in automates and simplifies the capture and maintenance of business contacts. Sales representatives appreciate the possibility of accessing customer and contact data and scheduling appointments on their mobile devices via a business app.

#### **CRM combined with ERP and Data Warehouse**

ZIEHL-ABEGG also benefits from the combination of the new cloud CRM platform with existing IT solutions: an ERP system from ProAlpha and an in-house developed data warehouse system (DWS). In this way, the CRM and the ERP (with which the complete quotation and order process including pricing is carried out) can exchange customer and contact data bidirectionally.

The Data Warehouse in turn is embedded in the CRM user interface via its own interface, with which business users can access their key figure reports. The interlinking of the CRM with the ERP and the DWS is managed easily with specially developed interfaces based on the ORBIS connector.

Thomas Brommer's conclusion is positive: *„Thanks to Microsoft Dynamics 365 Online, we can now carry out sales processes across all subsidiaries, IT-supported and uniformly, with great efficiency and transparency“.*

#### **More efficient with ORBIS enhancements**

ORBIS experts have extended the CRM solution to meet the needs of ZIEHL-ABEGG's end users so that they can complete their tasks more efficiently. In an opportunity, order information such as article number, name, quantity and price can be entered for a desired article and assigned to a suitable product group.

In another example, with the help of selection criteria sales people can extend invitations to exhibitions and trade fairs directly at customer contact. The CRM solution can also be used to specify and maintain which ventilation devices and solutions are in use at a customer.



*Thomas Brommer, Export Sales Manager at ZIEHL-ABEGG SE*



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ZIEHL-ABEGG SE

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