



## ORBIS ManufacturingONE Dynamics 365 for Customer Engagement

**CRM industry solution for mechanical engineering,  
the electronics industry and high tech**

**ORBIS MANUFACTURINGONE**  
Dynamics 365 for Customer Engagement



# ORBIS ManufacturingONE

Companies in the production industry are currently faced with a multitude of challenges, such as increasing globalization, ever shorter innovation cycles and growing competition. As a result of this, it is becoming increasingly important to build long-lasting relationships with customers to clearly stand out from the competition and to achieve long-term successes. Companies should therefore make customer loyalty and customer value a priority, particularly when it comes to all business decisions.

## CRM – the key to success

But extensive knowledge of customers is essential if one's own products and services are to be further developed based on customer requirements. This information must be available to all the departments involved in a permanent and transparent fashion. A comprehensive CRM system provides you with support in this regard. It enables you to successfully overcome the various challenges in a future-oriented manner. It helps you to purposefully increase effectiveness and efficiency in marketing, sales and service and enables you to shorten your sales cycles, to strengthen customer loyalty and to boost your profits in the long term.

Being a long-standing partner to both Microsoft and SAP, ORBIS has developed the CRM industry solution ORBIS ManufacturingONE to meet precisely these requirements. The solution is the result of experience acquired from more than 30 years of CRM-related consulting and proven expertise in the production environment.

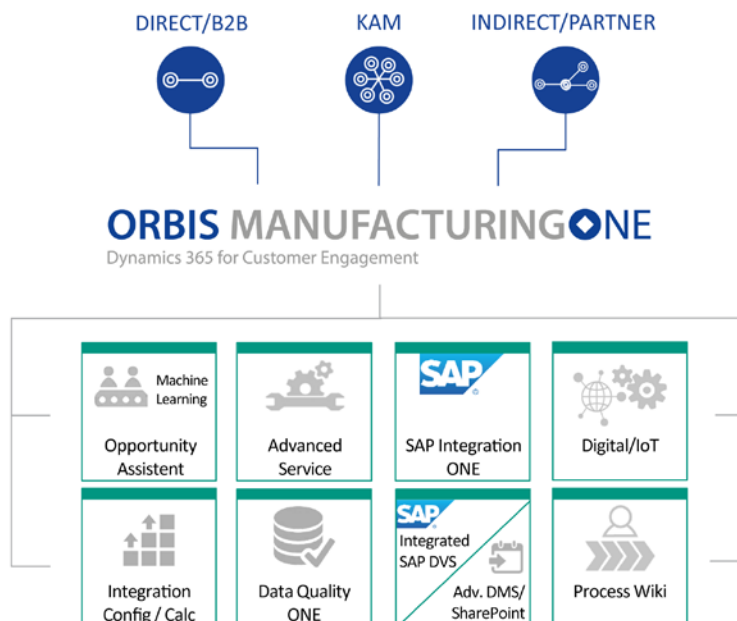
## CRM industry solution for mechanical engineering, the electronics industry and high tech

The CRM industry solution ORBIS ManufacturingONE is optimally adapted to the special requirements of companies from the electronics industry, the production industry, high tech, mechanical engineering and the service-oriented industry, and offers industry-specific functionalities for efficient handling of your business processes in marketing, sales and service.

ORBIS ManufacturingONE compiles all the information relating to one customer on a platform and thus guarantees you a 360-degree view of the customer in question. The entire history – from initial contact, over all the quotations, to the order – including all the price and product information is clearly presented. For quick and easy preparation of quotations, it is also possible to seamlessly integrate an external CPQ (configure, price, quote) system too.

To focus on the most valuable customers with the greatest potential, the solution supports optimum sales management by classifying customers systematically. Potential-oriented visit planning based on this proposes a suitable visit frequency and thus helps to increase customer satisfaction, at the same time as cutting sales costs.

## CUSTOMER CLASSIFICATION



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**ORBIS ManufacturingONE includes the following processes and functionalities:**

## Sales

- ◆ Customer and contact management
- ◆ Customer segmentation and customer rating
- ◆ Visit planning
- ◆ Visit reports
- ◆ Area management
- ◆ Product catalog
- ◆ Document management (SharePoint)
- ◆ Key account management (optional)
- ◆ Route planning and route optimization (optional)
- ◆ Data quality management (optional)

## Opportunity management

- ◆ Project management
- ◆ Sales funnel management
- ◆ Fast quotation and order entry
- ◆ Connection of external CPQ (configure, price, quote) systems possible (optional)

## Marketing

- ◆ Marketing segmentation and list management
- ◆ Grassroots campaigns and lead management
- ◆ Lead to opportunity process
- ◆ Multi-channel campaign management (optional)
  - Multi-channel campaigns
  - Email marketing
  - Marketing automation
  - Lead generation and lead nurturing
- ◆ Customer experience management (optional)

## Sales controlling

- ◆ Performance management and analysis
- ◆ KPI monitor
- ◆ Sales planning (optional)
- ◆ Customer planning (optional)

## ORBIS ServiceONE

Service management is crucially important for manufacturers of capital goods. After all, only companies that impress in global competition with excellent customer service can successfully set themselves apart from their competitors and achieve long-term successes.

This is precisely why ORBIS has developed the ORBIS ServiceONE solution, which is also available, to complement ManufacturingONE. Document all service inquiries regardless of the contact channel, plan your technicians' service assignments and provide your service organization with all the information it needs for optimum customer support. The complete machine history provides information about the products sold, serial numbers and service contracts, so all the people involved are informed of the current status of the installed base at all times.

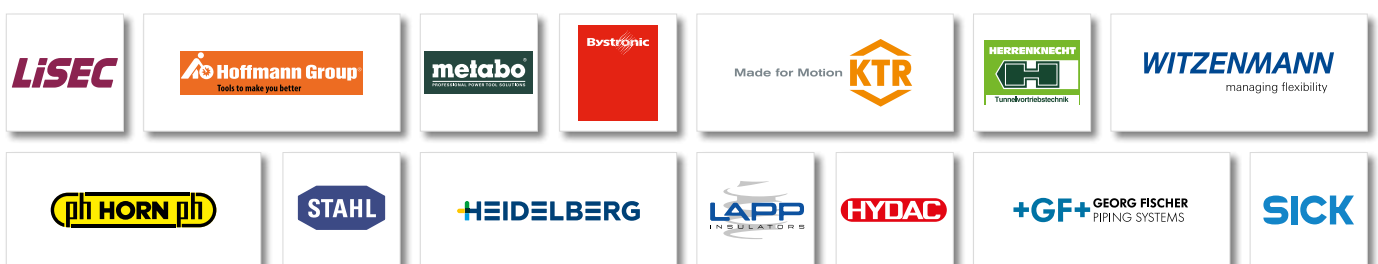
## Service

- ◆ Service inquiries
- ◆ Service and repair orders
- ◆ Maintenance management
- ◆ Installation management
- ◆ Machine and plant management / installed base
- ◆ Contract management
- ◆ Service level agreements
- ◆ Knowledge management
- ◆ Graphic deployment planning
- ◆ Field service
- ◆ Partner and customer portal

## The benefits for you:

- ◆ Increased transparency due to company-wide provision of information
- ◆ Quick and easy preparation of quotations, with integrated product configuration possible
- ◆ Continuous plant history
- ◆ Efficient field service management
- ◆ Optimized customer segmentation and customer rating
- ◆ Structured customer development
- ◆ Efficient service processing

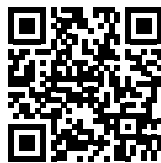
## AN EXCERPT FROM SATISFIED CUSTOMERS



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## Find out more



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