



**b4b solutions**  
Customer Experience

CASESTUDY

WEBER-HYDRAULIK GMBH

# DIGITAL MANAGEMENT OF CUSTOMER RELATION

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Four process changes for  
increased success in customer relationship  
and opportunity management



**one idea ahead**

WEBER-HYDRAULIK TACKLES THE DIGITAL TRANSFORMATION OF ITS SALES PROCESSES AND THEREBY ACHIEVES A

# CUSTOMER RELATIONSHIP MANAGEMENT AT THE HIGHEST LEVEL

A rolling stone gathers no moss - in the case of the manufacturing company, this maxim is not only applied to the permanent further development of hydraulic systems and components. The Swabian family-owned company from Gütlingen with its 80-year history of success is always eager to adapt to current customer needs and thus to strengthen and further expand its leading position in the hydraulics market. **“Investments in research, development and modern manufacturing technologies as well as the continuing training of our employees ensure our sustainable and profitable progress”**, says Deputy Business Division Manager Hanno Diekmann, describing the entrepreneurial approach.

The same motivations led the company to tackle its digital transformation project and to analyse its customer relationship management and internal processes for optimisation potential. **It soon became apparent that the introduction of a mobile CRM system would be a necessary step in order to meet increasing customer demands and utilise valuable customer knowledge in a profitable way.**

Simultaneously, a structural revision of the sales processes had top priority in order to advance the further growth of the company. After careful consideration, the hydraulics manufacturer decided to introduce a cloud-based CRM platform, which was successfully implemented in cooperation with the customer experience expert B4B Solutions.

**This case study demonstrates how WEBER-HYDRAULIK has optimised its processes from customer relationship and opportunity management to quotation and sales control in four steps by implementing a modern CRM solution. Valuable customer knowledge is now consolidated in a single platform that enables a 360° customer view. This ensures proactive customer care which meets the high quality standards of this innovative company.**



# KEEPING THE CUSTOMER IN MIND, TOGETHER

WEBER-HYDRAULIK GMBH has been developing high-quality cylinders, control blocks, steering and suspension systems, valves and power units for mobile machinery, commercial vehicles and machine tools as well as rescue equipment for over 80 years. "With our many years of experience in component development and production as well as our high level of system expertise, from design to implementation, we are ideally positioned as a development partner and system provider", says Deputy Business Division Manager Hanno Diekmann, summarising the strengths of the forward-thinking company.

**In order to meet the high demands of its international customer base not only at product level, but also in terms of a seamless customer experience, WEBER-HYDRAULIK initiated its digital business transformation project.**

The company examined all touch points of a typical customer journey from the first contact of a prospective customer with the company to the initiation of business and the shaping of long-term customer relationships.

An analysis of the customer journey clearly showed that data quality has top priority in order to always have an eye on the wishes and needs of customers and partners. To increase its own productivity and ensure further growth, the company also set itself the goal of achieving a noticeable increase in efficiency in sales. Everything from opportunity management to scheduling visits and making offers was to be digitised, automated and thus streamlined and made more transparent.

"WEBER-HYDRAULIK's sales force is responsible for an international customer base. Mobility is very important to the company and our employees are valued for their expertise as consultants. Due to the lack of a standardised solution and the resulting complicated internal processes, however, sales cycles were unnecessarily delayed", says Deputy Business Division Manager Hanno Diekmann, recalling the situation.

For instance, customer data was stored and managed individually by the respective sales representatives, which made internal coordination more difficult and also resulted in additional work for sales management. Communication between sales force and office staff was also more time-consuming than necessary due to the lack of sufficient interfaces.

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### **A 360° CUSTOMER VIEW SUPPORTS THE ENTIRE SALES PROCESS.**

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**"IT WAS TIME TO BREAK UP OLD  
SALES STRUCTURES AND ESTABLISH  
NEW, EFFICIENT SALES PROCESSES  
THAT REFLECT OUR VISION OF  
CUSTOMER RELATIONSHIPS BASED  
ON PARTNERSHIP."**

Hanno Diekmann,  
Deputy Division Manager WEBER RESCUE

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"We were looking for a mobile CRM solution that would allow a 360° customer view, support our employees on-site with the customer and simultaneously simplify communication with the office staff. Above all, however, we wanted to ensure optimal leveraging of customer potential, and for this, more transparency had to be provided to enable targeted control by the sales manager."

In order to further expand its competitiveness, the company, along with its implementation partner B4B Solutions, defined a catalogue of goals and measures for the launch of a new mobile CRM solution and the accompanying process optimisations.



# THE FOLLOWING PROJECT GOALS WERE SET FOR THE DIGITAL TRANSFORMATION OF THE SALES PROCESSES:

INCREASING EFFICIENCY IN SALES

IMPLEMENTATION OF A 360° CUSTOMER VIEW WITH THE HELP OF A TARGETED CENTRAL DATA BASE

INCREASE CUSTOMER SATISFACTION THROUGH OPTIMISED NEEDS IDENTIFICATION AND PROACTIVE CUSTOMER CARE

ESTABLISHING A FLEXIBLE SYSTEM THAT WILL ALSO BE ABLE TO MEET FUTURE MARKET REQUIREMENTS

FAST AND RESOURCE-EFFICIENT PROJECT IMPLEMENTATION

# FOUR STEPS TO SUCCESS

To sustainably optimise the company's opportunity management, 4 process changes were defined and successfully implemented.

01

## TRANSPARENCY & MOBILITY

With the introduction of a central storage system the most important step for the digital transformation of the sales processes was taken right at the beginning. Valuable knowledge about customers and products can now be documented and uniformly stored in the mobile CRM solution. "Our field staff is naturally mainly found at the customer's site - to ensure a successful flow of information, we were looking for a solution that would optimally support internal communication and collaboration and further expand the mobility of our employees," says Deputy Business Division Manager Hanno Diekmann, outlining the requirements for the new company solution.

From now on, queries can be made with just a few clicks. For example, an Area Manager can get an overview of the activities in his area and, if necessary, colleagues can easily take over tasks and appointments with all relevant information.

For Diekmann, this is a clear competitive advantage: "Our customers and partners now benefit from an individual, needs-based approach and customised offers that are precisely tailored to the respective product life cycle."

A central documentation system creates the basis for professional customer relationship management and bundles all relevant customer data in a 360° view. It supports sales in many ways:

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**LOCATION-INDEPENDENT DATA ACCESS  
THROUGH MOBILE INTEGRATION**

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**IMPROVED COMMUNICATION**

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**MORE TRANSPARENCY IN SALES**

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**CENTRAL STORAGE OF VALUABLE  
CUSTOMER KNOWLEDGE**

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**OPTIMAL LEVERAGE  
OF CUSTOMER POTENTIAL**

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## TARGETED OPPORTUNITY MANAGEMENT HELPS TO ACHIEVE HIGHER CLOSING RATES.

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02

# OPPORTUNITY MANAGEMENT

The implementation of a centralised opportunity management system was a milestone in the company's growth strategy. The previously decentralised recording and management of sales opportunities had reached its limits as the customer base had grown. Consequently, the stated objective was to generate more orders with the same sales force and, with the help of the analysis of missed opportunities, achieve an additional increase in quality.

Hanno Diekmann outlines the process change that has taken place: "We wanted to achieve data-driven proactive customer care and noticeably shorten our sales cycles. Our current solution allows us to specifically develop sales opportunities until they are closed by identifying potential deals at an early stage and prioritising them automatically."

The standardised view of individual sales opportunities now optimally supports the sales department in planning its activities and measures. The entire sales process with all relevant document assets and customer data can now be mapped, evaluated and managed via a central mobile interface. Automated processes and AI recommendations simplify

ENTRY OF OPPORTUNITY,

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PRODUCT ALLOCATION,

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360° OPPORTUNITY VIEW,

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ACTIVITY PLANNING,

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MAKING THE OFFER,

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AND ORDER CREATION.

The further analysis of recorded activities also allows for a sustainable optimisation of sales performance, resulting in shorter and increased sales cycles and higher closing rates.




03

## SCHEDULING VISITS

The manufacturing company has an international customer base, meaning that the sales force is often travelling in other European countries. Internal coordination in the form of regular team meetings with joint appointment coordination is hardly feasible and, with the respective digital tools, no longer necessary. With this in mind, Reiner Stuber, Sales Manager at WEBER RESCUE SYSTEMS, was looking for a way to facilitate the exchange of information and to always be aware of current team activities in real time:

“When planning visits, we are confronted with widely varying lead times. Many appointments are made months in advance, some are made at short notice and others are made proactively. With the digitisation of our visit management, synergies between individual appointments needed to be identified and routes needed to be better planned.”

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**“AS A SALES MANAGER I WANT TO KNOW WHERE MY EMPLOYEES ARE CURRENTLY TRAVELLING, WHICH CUSTOMER IS CURRENTLY BEING SUPPLIED, AND HOW OFTEN OUR CUSTOMERS ARE VISITED.”**

Reiner Stuber  
Sales Manager WEBER RESCUE SYSTEMS

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The digital visit management maps all information relevant to the visit on the push of a button and ensures transparency and flexibility. It allows the central administration of the entire customer visit history as well as easy

**COORDINATION OF VISITS,**

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**PLANNING OF TOURS AND ROUTES,**

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**CREATION OF VISIT REPORTS,**

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**CONDUCTING OF SURVEYS,**

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**AND CREATION OF FOLLOW-UP ACTIVITIES.**

As a result of the comprehensive process optimisation in this area, the sales force can now effectively spend more time with the customer.

04

## OFFER MANAGEMENT

Due to the intensive travelling activities of the sales force, mobile order entry was an essential component in the optimisation of the sales processes at WEBER-HYDRAULIK. After all, simplified channels in offer management contribute significantly to shortened sales cycles. Before the transition, offers had to be recorded in a separate system and transmitted to the office staff. The latter created an order in the ERP and returned it to the sales force. In case of queries, telephone or e-mail was used, and the answers were again entered separately into the ERP. Here, again, the team around Hanno Diekmann saw a need for improvement: "It was clear to us that modern offer management could not be handled via e-mail communication and that we wanted to make better use of our employees' resources."

By implementing an intelligent sales system, this formerly time-consuming exchange could be automated and numerous work steps were eliminated. The process of entering information now takes place directly and automatically via the platform, and communication between field and office staff is much simpler and smarter.

This results in comprehensive process optimisations for the sales force in terms of:

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### OFFER CREATION

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### CONFIGURATION OF VARIANTS

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### INTERNAL APPROVAL PROCESSES

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### SENDING AND TRACKING OFFERS

The redesigned offer creation has already brought the sales team numerous positive feedbacks from customers and encourages the company to pursue further digitisation projects.

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## PROCESS DISRUPTIONS BETWEEN SALES FORCE AND OFFICE STAFF ARE OVER ONCE AND FOR ALL.

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A portrait of Hanno Diekmann, a man with a beard and glasses, wearing a light blue shirt, with his arms crossed. The background is dark. The text is overlaid on the image in white, bold, uppercase letters.

**"DIGITAL TRANSFORMATION IS NOT AN  
ABSTRACT VISION OF THE FUTURE FOR  
WEBER-HYDRAULIK, BUT ACTUAL PRACTICE.  
IT OFFERS NUMEROUS OPPORTUNITIES  
FOR OUR COMPANY TO PROVE ITSELF TO OUR  
CUSTOMERS AS AN INNOVATIVE BUSINESS  
PARTNER. THE DIGITISATION OF OUR SALES  
PROCESSES HAS RAISED OUR CUSTOMER  
RELATIONSHIP MANAGEMENT TO A  
NEW LEVEL AND PROVIDES OPTIMAL SUPPORT  
IN ESTABLISHING NEW, STRONG CUSTOMER  
RELATIONSHIPS."**

**HANNO DIEKMANN**  
DEPUTY DIVISION MANAGER WEBER RESCUE

# CONCLUSION

## STREAMLINED PROCESSES, STRONG CUSTOMER RELATIONSHIPS

To summarise, Hanno Diekmann sees the introduction of the cloud-based CRM solution as a great success: "We are benefiting from a noticeable improvement in sales performance and are receiving positive feedback from our customers. A decisive step in our transformation towards a digital, connected and smart company has been taken!"

"With the SAP Sales Cloud, we have implemented a flexible CRM system in the company that we can tailor exactly to our needs and, if necessary, also adapt and expand to future challenges. Scalability and the possibility of further development reflect our understanding of ourselves as developers and innovators."

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✚ **The SAP Sales Cloud enables the sales team to master the challenges of modern customer relationship management in a mobile and efficient manner. Numerous work steps have been automated or simplified, freeing up valuable resources for proactive customer care, which is based on a comprehensive 360° customer view.**

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✚ **Media and information disruptions have been eliminated and the entire team now benefits from improved communication that, thanks to integration into the ERP, also includes the office staff.**

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✚ **Quality assurance in the sales process has reached a whole new level, as the sales management now has all the relevant information for control at the touch of a button and, above all, in real time.**

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✚ **Additional administrative and communicative efforts were eliminated and instead a system was introduced that ideally supports the sales team, facilitates their daily work and, thanks to its streamlined processes, optimally contributes to building strong and sustainable customer relationships.**

# TRANS- FORMATION SUCCEEDS WITH THE RIGHT PARTNER

Always keeping an eye on the customer while never losing sight of the company's goals – with the successful digitisation of its sales processes, WEBER-HYDRAULIK has raised its customer relationship management to a new level. To this end, the company relies on the SAP Sales Cloud – an innovative CRM system that was established together with implementation partner B4B Solutions.

Due to the visible improvement in quality and the resource-saving and rapid project handling the company decided to tackle another digitalisation project together with B4B Solutions. The company has implemented a service portal for efficient ticket management, which ensures comprehensive customer support even after the sale and optimises the repair processes significantly thanks to simplified communication channels.

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**“WE INFORMED OURSELVES IN ADVANCE ABOUT THE FUNCTIONALITIES OF DIFFERENT CRM SOLUTIONS AND COMPARED THEIR FUNCTIONALITIES WITH OUR GOALS. THE DISCUSSION WITH B4B SOLUTIONS WAS VERY INSPIRING AND HAD A CONVINCING FOCUS ON INNOVATION COMBINED WITH REAL-WORLD RELEVANCE AND PRACTICABILITY.”**

**HANNO DIEKMANN,**

Deputy Business Division Manager WEBER-HYDRAULIK

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# THE BENEFITS

## OPTIMISED SALES PROCESSES FOR WEBER-HYDRAULIK AT A GLANCE

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### 01 **CENTRAL DATA MANAGEMENT**

Prevents information disruptions and loss of know-how

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### 05 **TARGETED OPPORTUNITY MANAGEMENT**

Leads to increased performance in qualitative development of sales opportunities

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### 02 **360° CUSTOMER VIEW**

Supports proactive customer care and increases the sales rate

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### 06 **EFFICIENT VISIT SCHEDULING**

Identifies and exploits synergies in route planning

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### 03 **TRANSPARENT REPORTING & CONTROLLING**

Made possible by the central platform in just a few clicks

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### 07 **INNOVATIVE OFFER MANAGEMENT**

Significantly shortens sales cycles and simplifies making offers

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### 04 **USABILITY**

Is achieved through an intuitive interface and results in better data management

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### 08 **SUSTAINABLE CUSTOMER LOYALTY**

Excellent customer relationship management leads to satisfied and loyal customers



# LET'S TAKE YOUR BUSINESS TO THE NEXT LEVEL

B4B Solutions is an innovative IT service company within the All for One Group. Its mission is to make companies **more successful, faster, and more digital** based on state-of-the-art cloud software solutions.

As an expert for Customer Experience and SAP Platinum Partner, we provide our customers with innovative solutions from the cloud helping them to build sustainable, strong, and trusted customer relationships.

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