

Espec North America Manages Sales Growth using GoldMine and Made2Manage

World's largest environmental test chamber manufacturer integrates its CRM, ERP and Estimating applications

Benefits at a Glance

Increase business with reduced staff
Corporate plans requires improved productivity, innovation and strategic change for better customer relations.

Repeatable marketing, sales and customer service processes
prevent sales and support teams from working from multiple, unconnected resources or relying on memory.

Integrated CRM, ERP and Estimating – M2M is not as an effective sales or estimating tool as GoldMine and QuoteWerks. GoldMine provides a central repository for sales, support and service to generate more leads. QuoteWerks links all quotes to the customer in GoldMine.

Automatic territory assignment for dealers, service and sales staff
Eliminates confusion and provides better customer service.

Trade advertising is dead
Invest money and effort into generating leads through database marketing and trade shows.

Collaborative implementation matches ISO-9001 processes
Tempest customizes GoldMine and QuoteWerks to support and streamline ISO procedures.

Remote synchronization keeps remote reps in the loop
GoldMine data, price book and literature libraries available on remote laptops.



Goals require growth and reduction of non-manufacturing staff

ESPEC North America in Hudsonville, Michigan is a subsidiary of Espec Corporation, headquartered in Japan and the world's largest manufacturer of environmental test chambers. Espec NA provides international sales and service support through manufacturer's reps, overseas agents, contractors, and its own staff. It manufactures most of what it sells domestically, as well as increasing sales of custom equipment for overseas markets.

The parent company's Espec 130 Plan calls for business innovation through reform and change of its business and technology development strategies with specific goals to sell more (*increase corporate revenues to 30 billion yen*) and support the product with less staff (*2% of manufacturing*). According to David Jung, marketing manager, this means that Espec NA's Customer Relationship Management (*CRM*), Enterprise Resource Planning (*ERP*) and Estimating systems must work together to attain its corporate goals. "We need to offer more than a great product. While technologically ahead

"Tempest educated our selection team, provided an implementation roadmap and helped us cost-justify the investment to our management," reflects David Jung, marketing manager.

of our major competitor, we must maintain customer relationships so that we can increase revenue in service repairs and repeat sales."

GoldMine provides structure for improved teamwork, organization and communication

Tom Patterson, national sales manager, states, "GoldMine serves as a central repository for all of our customer contact information. Unlike Outlook, it allows us to share sales, service and support issues (*from phone calls, appointments, e-mails, and faxes*) internally and with our dealers and contractors. Also, we can delegate and communicate more effectively when we know each other's schedules."

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Empowering Sales and Marketing Teams

business case study

“Now, the sales department knows exactly what the support department has done. People who buy a used Espec chamber and order manuals or repairs from our support department become a lead for new equipment sales.” The significant travel and vacation schedules of Espec’s sales team made access to project records a high priority. “If a client calls when a salesrep is out, someone else can take the call and look-up quotes and e-mails related to their project.” Patterson says excitedly, “We appear more caring and organized to our customers because we actually know what is going on at an account level.”

Espec also synchronizes the GoldMine data, price book, and literature libraries to their remote reps.

Critical Success Factors

- Evaluation and streamlining of sales processes.
- Populating fields with relevant choices for uniform data entry and ensuring commitment by sales and support to record and properly code customer interactions.
- Creation and maintenance of a product database for quoting.
- Continual training and support for staff to exploit the power of the CRM.
- Willingness to share the software and data with manufacturer’s reps.
- Agreement that relationship marketing is a new strategy for increasing sales and profitability because trade advertising is dead. Invest money and effort into generating leads through data-base marketing and support annual trade shows.
- Professional implementation services and management guidance from Tempest to make Espec self-sufficient.

M2M Link provides sales details and speeds searching Made2Manage is Espec’s core ERP system for handling orders. Duplicate sales and order-management systems were a problem. “With the M2M Link tool from Compasys, we now can focus on accurate data in just one place and synchronize customer data.” Espec opted to import all 16,000 M2M customers and prospects, along with customer numbers and lifetime sales histories. The M2M Link makes it easy to locate existing customers in M2M and create new ones from the GoldMine record. “We constantly

“Only by active planning and continual effort to exploit its capabilities, can we ensure that CRM software will be a strategic, competitive advantage for our company,” states Jung.

refer to M2M to order parts or check the status of existing orders. Now, we have a place at our fingertips to store more information about an order. We use Goldmine to manage post-sale activities, such as sending approval packages for custom designs,” explains Jung.

QuoteWerks creates a repeatable process for quoting and forecasting Jung claims, “We found M2M’s estimating module lacking and chose to use QuoteWerks from Aspire Technologies. QuoteWerks provides accurate quotes for our stock chambers, as well as helps us configure custom ones.” It also creates an e-mail that packages Espec’s detailed specifications with each quote, adds the sales forecast, and schedules a follow-up call. Each quote also links to the GoldMine record for easy retrieval. Patterson boasts, “We expect to have more accurate sales forecasts and a repeatable process for creating quotes and their subsequent closure.”

Automatic territory assignment for dealers, service and sales

Because of Espec’s growth plans include shifting more sales and service of their products to outside agents, knowing which rep is assigned to each account becomes critical. Patterson says, “We can no longer rely on solely on memory or written records to track house accounts.” Tempest programmed Goldmine to automatically assign territories for sales and service, while allowing individual changes where necessary.

Next steps for streamlining the sales process

According to Jung, there is less time for prospect interaction for its low-end products, so having an automated follow-up system is a high priority. “We want inside sales to progress beyond just ‘e-mailing the quote’. We now have a uniform list of ‘benefits’ for each product and can articulate them in convenient pre-written e-mails and flyer sheets. Each salesrep ensures they get into the customer’s hands. Automated follow-up steps will also help and are planned for phase II.”

Espec commitment to CRM

To achieve its Plan 130 goals, Espec has made a long-term commitment to properly manage and maintain the GoldMine database and software. “Only by active planning and continual effort to exploit its capabilities, can we ensure that CRM software will be a strategic, competitive advantage for our company,” states Jung.

Tempest Implementation

Planning

- Review needs and marketing, sales, support and quoting processes.
- Plan implementation with staff and outside contractors.
- Review customization and M2M data conversion.
- Espec provides Tempest with ISO procedures, price list, letter templates and territory maps.

Installation and design

- Install GoldMine, QuoteWerks, M2M Link and GoldBox.
- Add user-defined fields and screens.
- Create lookup lists for territory assignments and service contractors.
- Import contact records from M2M.
- Import zip codes with GoldBox.
- Setup GM + Views for Mapquest and Company web site URLs.
- Create automatic lookups to assign territories based on area code.
- Customize print and e-mail templates.
- Customize reports for Forecasting/Booking, Equipment/Chamber Log and Open Support Call Report.
- Configure QuoteWerks, import product database, and create quote forms and attachments.
- Set-up users and security.
- Establish backup SQL scripts.

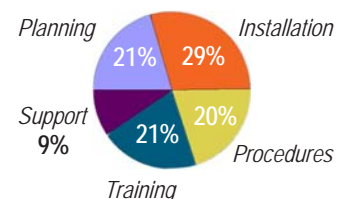
Training

- Develop custom training manuals.
- Pilot group training and briefing.
- Roll-out training to company.

Support

- Provide ongoing support and enhancements.

Consulting was 64% of investment



To find out how your organization can benefit from CRM, call:

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