

Kontineo CRMmatrix® improved time allocation towards individual customers at Bosch Rexroth

One of the classic challenges is that companies spend far too much time on managing their less profitable customers and on acquiring new customers instead of focusing on prospective customers with great sales potential and on additional sales to existing customers. Kontineo CRMmatrix® is a tool that helps the Bosch Rexroth sales staff spend time on customers that are most valuable to the company.

“Over a longer period of time we considered to categorise customers in a matrix in order to get an overview of whether our time was spent on the right customers, meaning, time should be allocated towards the best sales potential,” says Ole Nyborg, the Sales Director at Bosch Rexroth A/S. The company generates a turnover of more than DKK 0.5 billion annually. “We needed a tool and a method that would enable us to categorize customers. For that reason we met Kontineo that had the same idea regarding the output of such a matrix. It was important to us to create an interactive application that supported the sales staff in their daily routines – and that was not perceived as a monitoring device.”

Customers are segmented according to their importance

Kontineo CRMmatrix® is exactly the application that matches Bosch Rexroth’s needs. Ole Nyborg explains further: “The matrix segments customers according to the size of their purchase at the moment and according to their purchase potential in the future. If customers make small purchases or have a small future purchase potential, then the time allocation towards these customers should be adjusted accordingly. Of course, all customers have to receive a good service, however, more attention should be dedicated towards customers that make purchases for large amounts and that have great potential for additional purchases. Kontineo CRMmatrix® gives us an overview of valuable customers. In addition, it shows us how much time has been spent on individual customer segments. This enables us to assess whether time has been allocated to the right customers.”

Automatic data transfer from the financial system

When customers are to be placed in the matrix for the first time, the sales team is equipped with simple tools for the segmentation process. “The sales team enters the customers’ potential in Excel,” Ole Nyborg explains. “It is easy to use and does not require much work from the salespeople. Once a customer has been added to the matrix, most of

the remaining information will be transferred automatically from our financial system through integration and a few complex calculation rules in the matrix, which we don’t need to worry about. The only information the sales team has to add regularly is their sales visits as well as any changes in sales potentials. For instance, if a company has expanded production with a new machine, the sales potential may increase from DKK 10 million to DKK 15 million. This information has to be added by the sales staff.”

Is it time for another visit?

The matrix uses the sales staff’s information on meetings to keep tabs on the number of visits paid to the individual customer and the date of visits. If an important customer has not been visited within e.g. 6 or 12 months, it will be indicated by a certain colour and the salesperson can schedule visits accordingly. At Bosch Rexroth a red colour indicates that a customer has not been visited within the past 6 months. Thus, making it easy and efficient at all levels in the company to review whether important customers have been visited adequately.

Meeting planner

In addition, Kontineo CRMmatrix® consists of a meeting planner solution, which is of great benefit for the daily work of the Bosch Rexroth sales team. The meeting planner makes it possible to arrange as many meetings as possible with relevant customers that are close to the location where the sales staff already has scheduled a meeting. Ole Nyborg explains: “If someone from our sales staff is going to e.g. Holstebro for a meeting with a customer, he can click on this customer and review which other customers are located in the same area. Customers are among other things ranked according to their sales potential, which makes it easy for the sales person to determine which customer meetings may pay off the most. The meeting planner is integrated with the salesperson’s calendar. If a customer prefers a meeting on a different date, the sales person can with a simple click obtain a list of alternative dates on which he will be in the area.”

Easier work tasks for the sales team

The Kontineo solution makes the daily work routines for the sales team at Bosch Rexroth easier. Apart from the benefits mentioned above the sales people have a list of top 20 customers that require special attention. In addition, the sales people receive a notification when an offer is about to expire and action needs to be taken. "The system does not get the salesperson into the car, nevertheless, it makes it easy for him to allocate his time in an efficient manner," says Ole Nyborg. "You don't need any special knowledge to use the system. If you prefer to work with Excel, you can do as we do and add an Excel Write Back module, which allows us to retrieve data in Excel and transfer our entries back to the matrix, when we have finished working with the spreadsheet."

An important tool for strategic planning

The information in the matrix is used throughout the organisation. The interface is the same for salespeople, middle managers as well as senior managers enabling communication based on a common foundation. According to Ole Nyborg, Bosch Rexroth draws great benefits from this in connection with the tactical conversations of sales staff and sales managers: "Kontineo CRMmatrix® enables us to visualize data from our financial system combined with data from our CRM system and we benefit greatly from this. For example, the figures from the financial system are automatically illustrated as a customer movement in the matrix, which gives sales staff and the sales manager a foundation for developing a strategy for subsequent work. We can see where the customer was placed a year ago and where the customer is placed currently. Arrows clearly show in which direction the customer has moved. This provides a good starting point for individual strategic planning between the salesperson and the sales manager."

The system takes the salesperson's working day as its starting point

Bosch Rexroth has several different business units that make sales to the same customers. Kontineo's customer profile helps the individual salesperson to gain an overall idea of what the status of each customer is. "The customer profile is very useful for our sales staff," Ole Nyborg explains. "If I have to visit a customer, I can click on a button and get a quick overview of sales from the various business units. For instance, I can see the complaint made by a customer, which has the effect that I am much better prepared for my next meeting with the customer. In addition, the salesperson can automatically receive an e-mail with customer information the day before a planned meeting. The Kontineo CRMmatrix® solution takes to a great extent its starting point in the daily work routines of the salesperson, which makes it stand out significantly from other solutions."

CRMmatrix® encourages managers to get involved

Once a month Kontineo automatically sends extensive but easily read and understood reports to the sales staff, sales management and the strategic senior management. The content differs according to your function: A salesperson re-



ceives an overview of own customers, while senior managers receive information on the company in general. The automatically sent reports are used systematically for monitoring targets in tactical discussions at operational and tactical levels as well as at the highest senior level in strategic management group meetings. "The reports provide answers to key questions that feature frequently in meetings at all levels. They are vital for management's involvement and this rubs off on the entire organisation," Ole Nyborg points out.

A good application – and a good partnership

"Investing in Kontineo CRMmatrix® has been a great choice for Bosch Rexroth," says Ole Nyborg. "We can now visualize the time allocation and check whether it matches the strategic plans set by senior management. In other words, we can assess whether there is coherence between targets and efforts in the company. Further, our partnership with Kontineo has been a pleasure throughout the entire process. Apart from being our supplier they also served as our advisory partner during the introductory phase and throughout the implementation process. The partnership has been easy and flexible and the matrix makes our job much easier. A salesperson has to have a tool that helps him to view daily time allocation, order intakes and earnings and Kontineo CRMmatrix® is a great application fulfilling this demand."

Box Rexroth A/S supplies products within the areas of hydraulics, pneumatics, power and control engineering and linear assembly technology. Its 110 employees work in the divisions in Hvidovre, Kvistgaard, Randers and Vejle.

Kontineo A/S offers primarily intelligent method and technology solutions for the streamlining of processes in sales, marketing and customer service. Consulting services and delivery is performed in collaboration with partners within various areas of expertise primarily in Scandinavia.

CRMmatrix® is a registered trademark, owned by Due & Partners Aps.

A red figure in Kontineo CRMmatrix® shows the number of customers that have not been visited for more than a year. One click shows these customers making it easy to take action.

Kontineo CRMmatrix® shows customer movement and whether efforts in specific segments are having an effect – further, a red arrow serves as a good alert.

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