

Berg Europe Corp. partners with Kinotech to build Customer Relationship Management System.



Summary

Berg Europe Corp. (“Berg”) is a world-market leader in large-diameter linepipe production. Berg engaged Kinotech develop a custom CRM application that could support their inside and outside sales teams, as well as procurement, U.S. management and executive leadership. Kinotech delivered the application within weeks of formally kicking-off development.

Challenge

Prior to approaching Kinotech, Berg relied predominately on Microsoft Excel to manage their U.S. sales organization. Sales forecasting was tracked via manual tools and processes, where any change in the forecast or other update was done manually via a master Excel sheet.

Managing an entire sales organization via Microsoft Excel, especially one that is split between two different geographical locations, presents several challenges. Inevitably, there is a continuous struggle to ensure the data tracked via Microsoft Excel is up to date, accurate and always accessible to all stakeholders. Aside from the obvious risk of human error other more serious challenges and problems inevitably emerge, such as the loss of a historical viewpoint and the lack of a consistent standard that defines how information is input and tracked. Keep in mind that as soon as a Microsoft Excel sheet is updated by any member of the organization then all other sheets, reports and other derivative works have become outdated and potentially obsolete. This results in a never ending effort to update the sales tracker, share the updated information with all stakeholders and then update and re-share all reports and derivative works created using that data.

Consider that without some level of consistency and standardization in how sales, customer and competitor information is captured then accurately generating reports for management and the executive group is nearly impossible. After all, how can one guarantee the current year forecast is accurate if the underlying data is suspect?

Another bottleneck identified by Kinotech and Berg that impacted the quotation process for the sales team was

their inability to quickly model various production and delivery schedule scenarios for current and potential customers. The lack of if-then scenarios playing necessarily slowed down the turnaround time for quoting projects, as each potential scenario had to be sent to production scheduling for analysis.

Developing accurate, automated and meaningful reporting and analytic capabilities for mature organizations is always a challenge. Most organizations simply lack the technical tools and know-how to develop the capabilities they need to provide the insight they are lacking. Berg devoted several hours each week to create multiple reports utilized by the various stakeholder groups. In addition to the amount of time and effort necessary to create these reports, another consistent headache was the uncertainty surrounding the accuracy of the data being reported. When you then also consider that certain reports will become stale and obsolete almost immediately after they are created and dispersed, once can begin to understand the challenges faced by Kinotech and Berg.

A separate and even more complex set of reports were manually created each quarter for executive review, where these reports provide forward looking viewpoint at a particular moment in time. Manually capturing the data necessary to then create these reports was not only time consuming and prone to error, but the reports were also unavailable on demand.

Without a doubt one of the most important challenges Berg presented to Kinotech was how to improve their competitor tracking capabilities For companies like Berg, understanding what their competitors are doing as it relates to each past, current and proposed project is critical to ensuring they remain a step ahead of their competition.

Solution

Berg turned to Kinotech to develop a custom CRM application that could be utilized by all key stakeholder groups within the sales organization, including: inside sales, outside sales, procurement, management and executive leadership. Berg needed to move quickly and have the application up and running within a couple of months. Utilizing agile development Kinotech was able to deliver “Berg CRM” within 4 weeks, where together Berg

and Kinetech designed custom workflows for each process within the sales organization. Berg was also able to define every report, chart and data view they wished to see.

“Partnering with the Kinetech Team made sense for us because they offered a compelling opportunity - to develop a custom app within a matter of weeks, where our needs were the only focus.”

***Peter Borgards – President
Berg Europe Corp.***

Kinetech engineers designed and developed the application alongside key members of each of Berg’s stakeholder groups. By embedding the business into the actual design, development and testing process at the outset of the engagement Kinetech was able to ensure maximum development efficiency, a low cost and low risk of failure and generally ensure Berg’s needs and requests were addressed and satisfied. The use of iterative development, where Kinetech’s engineers focus on a single piece of functionality at a time and then design, develop, test, gather feedback and repeat until we get it right ensured Berg’s expectations were met and the risk and cost of failure was contained.

Results

Berg CRM is a full service CRM application utilized by Berg’s entire US sales organization. The sales tracking and reporting process has been automated for Berg, thus saving the sales organization an enormous amount of time and resources. Forecasts are automatically updated based on user inputs and the passage of time. Kinetech also created custom workflows for each process from how managing inbound inquiries to acknowledging a projects as won or lost. Once we structured a repeatable process, we were then able to ensure the proper data is input in a consistent format and then generate the necessary outputs utilizing that data.

Prior to adopting Berg CRM, the confidence in the accuracy and integrity of sales, customer and competitor data was suspect because of a lack of data governance, formalized processes and an over reliance on Microsoft Excel. The adoption of Berg CRM has alleviated all concerns about data accuracy and integrity, and now Berg

management and executive leadership can be confident that each report displays only the most accurate and up to date information available.

Access to accurate and up to date data is critical to enable the reporting and analytic capabilities requested by Berg management and executive leadership. In particular, Kinetech provided Berg robust capabilities to track customer, supplier and competitor activities and movement, and then display and report on said data in ways that were meaningful and insightful. Berg CRM aggregates key information for each stakeholder group, including historical sales, purchase and forecast data for quarterly executive review. The application also aggregates project, quote, customer, supplier and competitor information that is then used to generate both on demand reports as well as automated reports that arrive in each stakeholder’s inbox every morning.

Berg CRM has unified sales activity tracking and reporting for the outside sales team. Each sales executive may submit sales activities via their mobile devices, and then access and review those sales activities (and the more important sales notes) from their desktop at any time.

Kinetech also developed delivery and production scheduling capabilities to enable the outside sales team to compare and forecast various scenarios, and then make a decision based both on availability of Berg resources and the likely profit margin of each project.

Fundamentally, the inherent flexibility to view and manipulate past, current and forecast data has provided Berg insight into their business, market dynamics and competitors that they simply lacked before partnering with Kinetech.

About Berg

Member of the EUROPIPE Group, the world-market leader in large-diameter linepipe production. EUROPIPE combines centuries of experience in steel processing with cutting edge technology. We manufacture longitudinal (BSPC) and spiral (BSPM) seam-welded large-diameter pipes in nearly every size desired, and develop the optimum solution for every requirement and every use.



Kinotech helps enterprises achieve their digital goals. Our Software-as-a-Service (SaaS) offerings and team of business engineers enable customers to capitalize on opportunities and remain a step ahead of the competition.

A recognized innovation leader, Kinotech is helping thousands of professional and dozens of businesses across industries achieve exceptional results. For more information, visit www.kinotechcloud.com and follow us on twitter @KinotechCloud.

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