

Lock Antriebstechnik GmbH Ertingen

CASE STUDY



Lock Antriebstechnik GmbH

Lock Antriebstechnik optimises service and sales processes with Microsoft Dynamics 365



Lock horticultural application
Venlohaus

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The performance of the Hitachi Solutions project team under the given conditions and also the uncomplicated, constructive cooperation have put us in an excellent position for coming project phases. We see rapid progress in our CRM project."

George Walter

Head of IT at Lock Antriebstechnik

The customer

The Ertingen-based company Lock Antriebstechnik supports customers worldwide in creating environments in which people, animals and plants feel safe and comfortable. Lock is a leading manufacturer of manual and electrical solutions for a wide range of ventilation, shading, lifting and adjustment tasks, for example in the greenhouse and stable construction as well as in architectural and industrial construction. The company's global network includes independent dealers as well as subsidiaries in the Netherlands, the USA and China. This enables Lock to offer competent advice, engineering and fast on-site service globally and regionally. In 2020, the company was named a "Great Place to Work".

The challenge

The company has grown continuously regionally and internationally in recent years. However, the functionalities in the existing ERP system were no longer sufficient to adequately support this growth. In December 2019, the year of the company's 175th anniversary, the decision was made to introduce an XRM system (Extended Relationship Management). Compared to the CRM system, the XRM system can map and manage more complex business processes and relationships with customers, business partners and suppliers. A solution based on the Microsoft Cloud was to bring together the processes in purchasing, sales, service and marketing in an overall view and make relationship management more efficient with more precise documentation of customer contacts. A replacement of the manual ticket tracking should also improve service quality, response speed and turnaround time for requests.

The additional challenge

Due to the COVID-19 pandemic, all project phases from evaluation to implementation to system training for staff had to be completed from May 2020 on a tight schedule and 100% remote. With a project team consisting of Lock employees and solution specialists from Hitachi Solutions, the rollout of Microsoft Dynamics 365 was nevertheless completed on time within two months.



Integrated solution

Seamlessly interlocking and automated processes from lead generation through marketing and sales to service.



Lock agricultural technology application
Dairy barn

The solution

Hitachi Solutions implemented Microsoft Dynamics 365 with predominantly standard "Sales" and "Customer Service" functionalities. This enables Lock to better track communication with customers and partners across all teams and reduce the time spent on tasks such as new business, enquiries and support.

A new interface based on Azure Data Factory enables smooth interaction between the ERP and XRM systems. This means that existing customer information can also be accessed in Dynamics 365. Users can access all data in Dynamics 365 on the road and on site, even without an internet connection. The usually very complex preparation of quotations can still be done via the ERP system.

The "Sales" functionality enables Lock to create more transparency in sales partnerships in the future. If, for example, an interested party from the agricultural sector is planning to build new stables, their enquiry about Lock modules may arrive at Lock via several sales partners. With all data in one place and a 360° view of customers and partner contacts, an overview is quickly created for all areas of the company.



Focus on the customer

More insights and decision-making certainty thanks to a 360-degree view of customers.

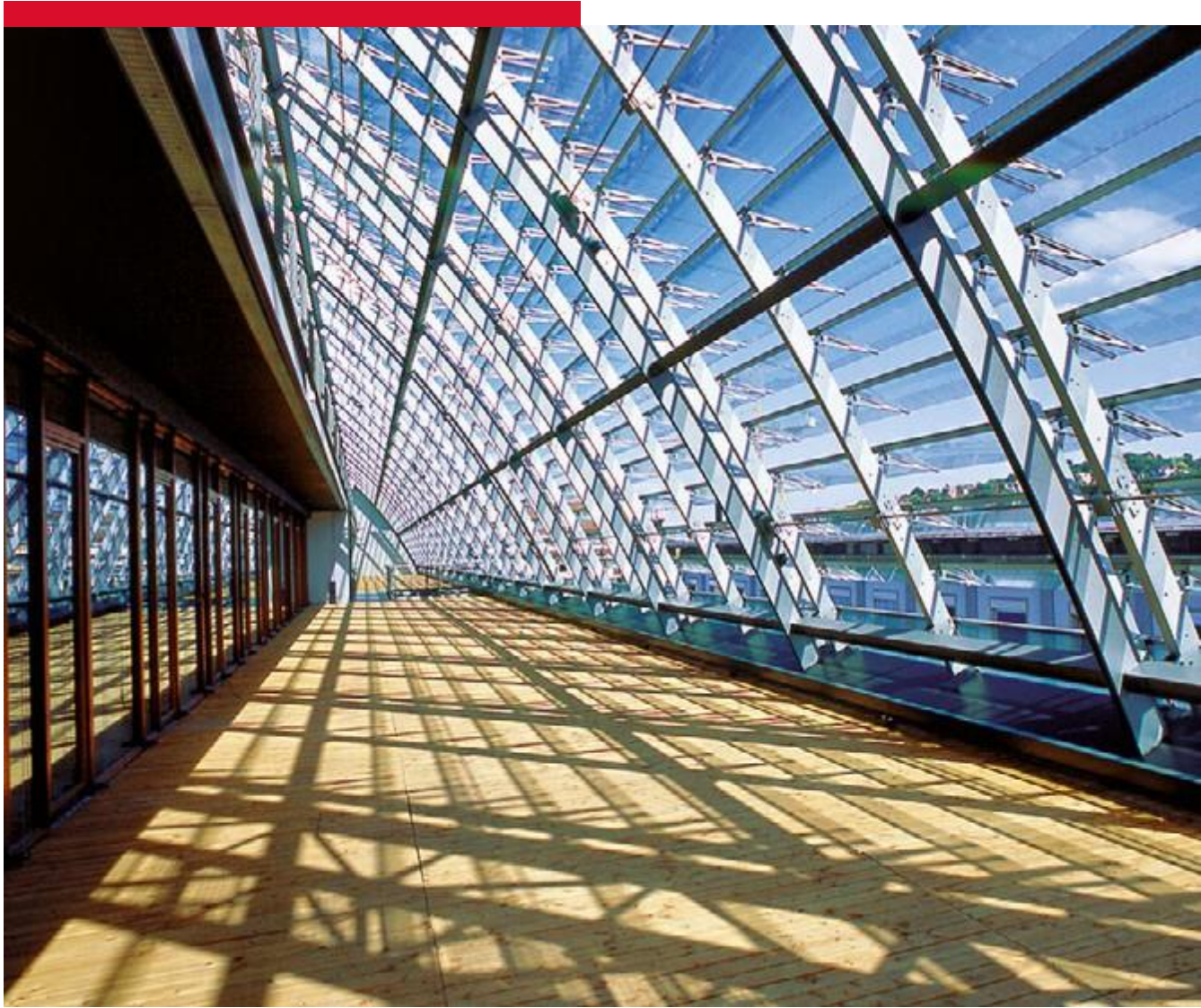
Lock lifting technology channel application
Empac New York



The "Customer Service" functionality supports the Lock staff in automatically classifying incoming service requests and thus allocate them to a service team more quickly. For this purpose, different types of service processes were defined as independent business process flows. Necessary work steps can be structured more precisely and carried out more efficiently. The mapping of projects and tenders was also taken into account, so that the most diverse constellations of cooperation in the partner network can be mapped.

The customer service functionality is also the basis for a knowledge database (e.g. with function descriptions, error messages, etc.), which will be part of the integrated solution from 2021 and will be available for both Lock support and Lock customers. An optional analysis of service cases makes it possible to better track error occurrences and to provide customised solutions for their elimination.

Lock lifting technology channel application
Königsbau Passagen Stuttgart





Lock horticultural application
Garden centre and sales greenhouse

Result

In the meantime, all employees in Sales and Customer Service are working successfully with Microsoft Dynamics 365. In future, the management of sales opportunities will be supported by Microsoft Dynamics 365 Sales from the initial contact with prospects, existing customers and business partners. The employees thus achieve the desired transparency - whether at the workplace or in the field on mobile via smartphone. The convincing performance under remote conditions as well as the uncomplicated and constructive cooperation pave the way for further project phases with which the XRM system can be expanded step by step. Microsoft Dynamics 365 is continuously developed further - the customer receives corresponding releases and security updates automatically. The technical basis of the XRM thus remains future-proof and can be expanded without any problems.



100 per cent remote rollout

The implementation was 100% remote in high quality during the COVID-19 pandemic.

Hitachi Solutions

✉ info@hitachi-solutions.de

 Website



 LinkedIn

