

## The Value Of A True CRM Tool

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Elobau Sensor Technology, Inc. designs and manufactures non-contacting sensor devices. The company specializes in both standard and custom designed products for use in industries such as industrial automation, agriculture, forestry, and construction. Elobau's solutions include joysticks, push buttons, level measurement components, cab controls, and a wide variety of switches and sensors. Founded in 1972, the company has 300 employees with representatives in more than 26 locations around the globe. Elobau's U.S. operations are based in Gurnee, Illinois, with global headquarters in Leutkirch im Allgau, Germany.

### Challenges

A key challenge Elobau faced in developing and maintaining strong customer relationships was the company had no formal method to track customer follow-up. Because a large part of Elobau's business is designing and manufacturing custom devices, some projects can take anywhere from one to three years to complete. Over such long periods of time, it is common for Elobau to work with many different individuals within customer organizations. The fact that precise follow-up records were not being kept meant that some key information was lost during the process.

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customer relationship management ([CRM](#) [1]) tool.

“We felt we could improve our service to customers and distinguish ourselves among our competitors by using a CRM solution,” said Maurice Bastidas, regional sales manager for the central U.S. region at Elobau.

### Solution

Elobau looked at several CRM products, including solutions from Salesforce.com and Avidian Technologies’ Microsoft Outlook-based Prophet CRM.

“We were looking for a solution that was easy to implement and that did not need a local server,” said Francois Mortier, general manager for Elobau’s U.S. operations. “We were also looking for a tool allowing us to manage complex sales and the follow-up of sales projects involving multiple contacts in one company.”

In the end, Elobau selected Avidian’s hosted CRM solution, Prophet OnDemand. This benefited Elobau because as a software-as-a-service, Avidian shouldered the burden of maintaining the backend equipment and data storage in its secure cloud. This gave Elobau access to their customer data on demand via the Web and freed them from having to deal with any of the routine IT management activities associated with the solution.

“We looked at another customer management tool, but when it came down to it, the other solution didn’t even seem to have 10 percent of the features that Prophet OnDemand has,” Mortier added. “For us, Prophet OnDemand, being built inside Outlook, but with all the backend infrastructure hosted by Avidian, made perfect sense.”

Other features of Prophet OnDemand that made the solution stick out to Mortier included project opportunity tracking, application configuration flexibility, sales stage reports, and the ability to assign projects to specific representatives.

### Implementation

Implementing Prophet OnDemand into Elobau’s infrastructure and processes took a couple weeks. The roll-out consisted of two main phases: the transferring of data from the old system and getting employees trained. One of the biggest hurdles faced during implementation was when the company discovered some of its customer data was not transferable. To address this, Elobau simply manually entered the data into the CRM system, which ended up only causing a slight delay of about a day.

The implementation took place virtually and each user was able to easily install Prophet OnDemand on his or her own computer. Avidian provided Elobau with a series of live one-on-one discussions using a Web conferencing tool and followed it up with supporting documentation which included written and video instructions. A few users had some minor issues, but they were resolved quickly with the help of Avidian’s technical support.

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“We were quite pleased with Avidian’s customer support,” Mortier said. “We would file a request for service and they would respond within 24 to 48 hours every time.”

Elobau has now been using Prophet OnDemand for nearly a year. The quick access to information on projects and customers has increased employee productivity as they no longer have to spend time tracking down customer information. Prophet OnDemand’s integration with Outlook allows for all contacts and follow-up details to be tracked in a common database, creating efficient access to key data.

Elobau is also using Prophet OnDemand to generate emails and follow-up on contacts met at tradeshow. To do this Elobau creates specific categories in Prophet OnDemand when they process new contacts. Elobau uses the filter to select these contacts to generate specific marketing actions.

“Right now, we feel like we’ve just barely scratched the surface in terms of what we can accomplish with Prophet OnDemand,” Mortier concluded. “We plan to continue implementing additional features. It’s like a big toolbox and at this point we’ve only opened a couple drawers. There are other tools we haven’t used yet, but we hope to in the coming months and are excited to see the ROI from using Prophet OnDemand continue to develop.”

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### **About Elobau Sensor Technology**

*Elobau Sensor Technology, Inc. is a global company that has been creating products in the non-contacting sensor technology area since 1972. Products include standard and custom solutions such as machine safety switches and systems, proximity switches and sensors, electronic sensors, rotary position sensors, tilt switches and sensors, level measurement components, plunger switches, joysticks, push buttons and cab controls. For more information, please visit [www.elobau-st.com](http://www.elobau-st.com) [2].*

### **About Avidian Technologies**

*Avidian Technologies is a software company specializing in creating both cloud-based and on-premise software solutions for users of Outlook and Exchange. Prophet, developed by Avidian Technologies on the .NET platform, is the leading contact management and [CRM](#) [1] software built inside Microsoft Outlook. The company is headquartered in Redmond, Washington. For more information, please visit [www.avidian.com](http://www.avidian.com) [1].*

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### **Links:**

[1] <http://www.avidian.com/>

[2] <http://www.elobau-st.com/index.html>

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