

Digital pioneer

Case study



Smart factory, smart sales

5 reasons why Balluff relies on the Sales Cloud

From an erstwhile mechanical repair workshop for bicycles, motorcycles and sewing machines to a digital pioneer: that's Balluff. A medium-sized company, family-run for four generations, which has grown into a leading global player in the field of automation solutions. A company that not only serves its customers and industry with smart manufacturing solutions in digitalisation, but also advances its own digital transformation. In production – and in the office. The

best example: sales. Balluff is active worldwide with a total of 38 branches. The company aspires to provide its customers with individual, on-site support in their challenges and to offer consistently high-quality consulting and service. That's why Balluff is taking sales processes to a whole new level with the SAP Sales Cloud. The company had several reasons for moving to the cloud-based IT solution.

BALLUFF

Company:	Balluff GmbH
Headquarters:	Neuhausen auf den Fildern, Germany
Industry:	Sensor technology and automation
Employees:	around 3,600 (2020)
Revenue:	€410 million (2020)
Solutions:	SAP Sales & Service Cloud, AMS
Web:	www.balluff.com/en-gb



1 Turning big data into smart data

Data is the gold of the 21st century. The challenge is to intelligently link and evaluate the endless pieces of information. Many companies have a situation similar to that of Balluff. The old system – in this case the SAP CRM On-Premise – has grown over the years, and the features have become fragmented. The larger the company becomes, the greater the risk that individual subsidiaries will develop the system and

save data locally. Balluff had a clear vision: moving to a centralised system in the cloud was to be the catalyst for analysing the data, increasing data quality and ensuring transparent and consistent use. Well-maintained, central master data is ultimately the basis for meaningful reporting – and for future-oriented company decisions.

Highlights

- Global approach: A template in all sales offices with customer base, leads, opportunities, offers, activities, visits
- Connect a trade fair app developed by Balluff
- Redefine the lead qualification process
- Quote tracking process for sales teams to track quotes based on a dynamic set of rules
- Transfer online shop information to C4C via SAP ERP
- Integrate SAP Analytics Cloud as a central reporting tool incl. mashup integration for a seamless user experience
- Record customer potentials based on product groups
- Map the sample order process for sample shipping and tracking
- Map customer satisfaction surveys via Sales Cloud campaigns

Integration with SAP ERP

- Bi-directional: Customer master data with a special interface from ERP in order to determine the organisational data in the same way as the ERP
- Unidirectional: Employees, material master, material hierarchy, offers, orders, customer hierarchy
- Opportunity price query and offer transfer to ERP
- Multiple Business One integrations as a multi backend scenario for the global integration of smaller branches into the global template and sales process

Interfaces

- To SAP Analytics Cloud for reporting: The SAP Analytics Cloud (SAC) is a cloud-based analysis solution from SAP that prepares, analyses and visualises data in detail – in both the web browser and mobile application. This enables Balluff to efficiently process, link and evaluate the wealth of data and information. The individual sales employees can now find embedded analysis dashboards for their orders. Global sales reporting via the SAC is also possible.
- To ERP for displaying service messages
- To ERP for displaying financial data on the customer
- To the Balluff sales app to retrieve master data from the Sales Cloud and to create leads in the Sales Cloud

2 Modern user design instead of Excel tables

So data is the new gold. The user experience is crucial for ensuring that this data is maintained. While data was previously distributed in a silo-like manner – such as across various Excel tables – the SAP Sales Cloud at Balluff offers a centralised system in sales, product management and business development with intuitive user guidance and highly modern user design. And it can be used for remote work, even beyond the coronavirus pandemic. Balluff employees can access the CRM system via app from any location using a tablet or smartphone. Even offline.

The result:

- High degree of user acceptance thanks to the latest user guidance and interface design
- More efficient workflows and system operation
- More efficient cooperation between all sales team participants

Another highlight: the integrated Outlook plug-in ensures a high level of control and transparency by synchronising customers, tasks, appointments and more.

3 Fewer costs, more flexibility

No, you won't find a flexible cloud solution at a bargain price. But at a sustainable price. The medium-term cost reduction was also a motivation for Balluff to move to the SAP Sales Cloud.

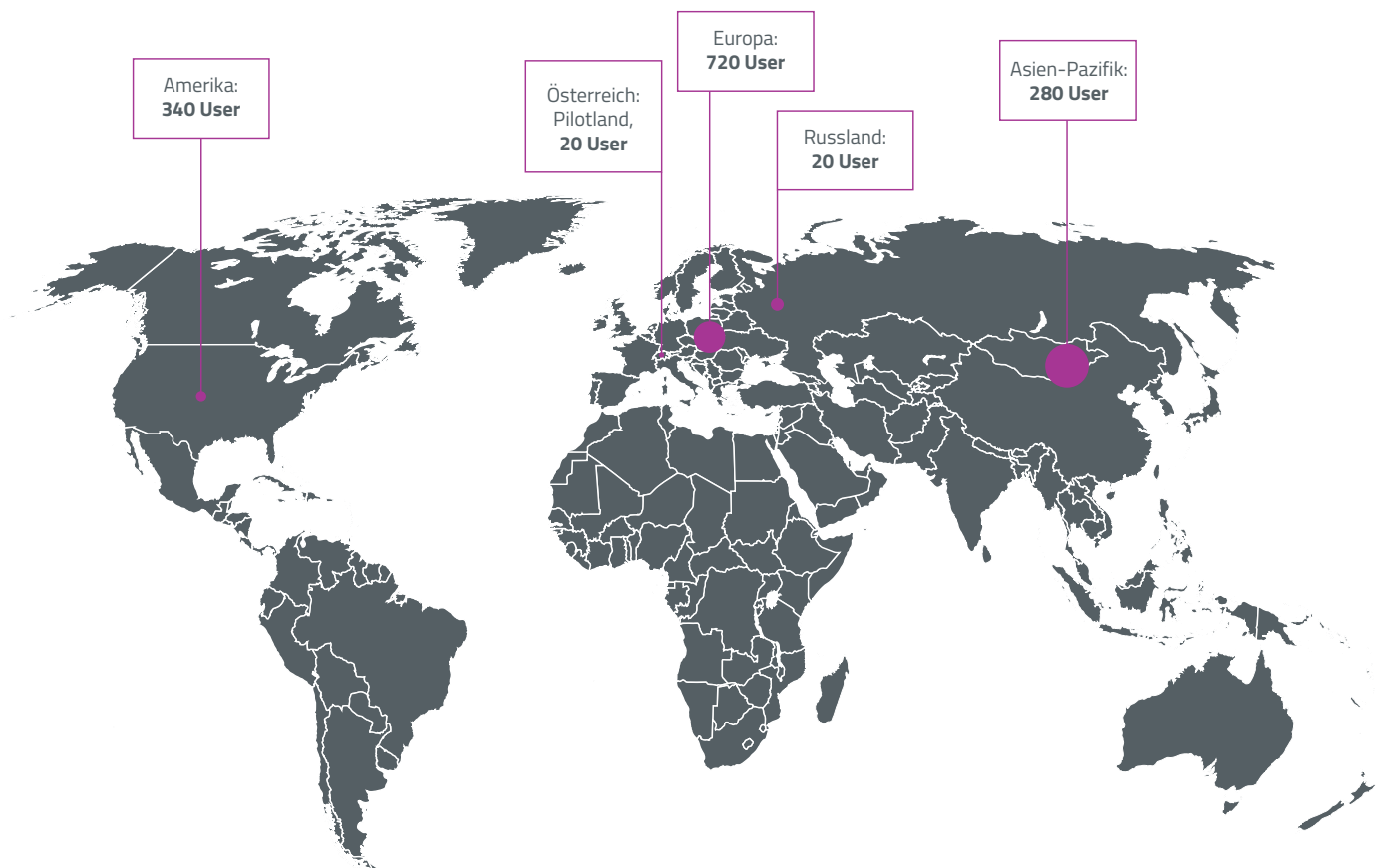
The cloud solution offers:

- transparent costs with the highest possible flexibility
- no hardware and maintenance costs
- services and flexible components that are quick to implement and that allow the IT department to build applications without having to worry about the complex infrastructure

4 Rapid rollout at new branches

Only three months after the go-live in Austria, Balluff launched its global rollout. All thanks to agile project methodology, the train-the-trainer concept and close support from Sybit directly after the go-lives.

1 Jahr → 30 Länder → 1200 User



5 Always state of the art

It used to be relatively costly for Balluff to implement new features and functions, and release updates and patches were irregular. The SAP Sales Cloud now offers:

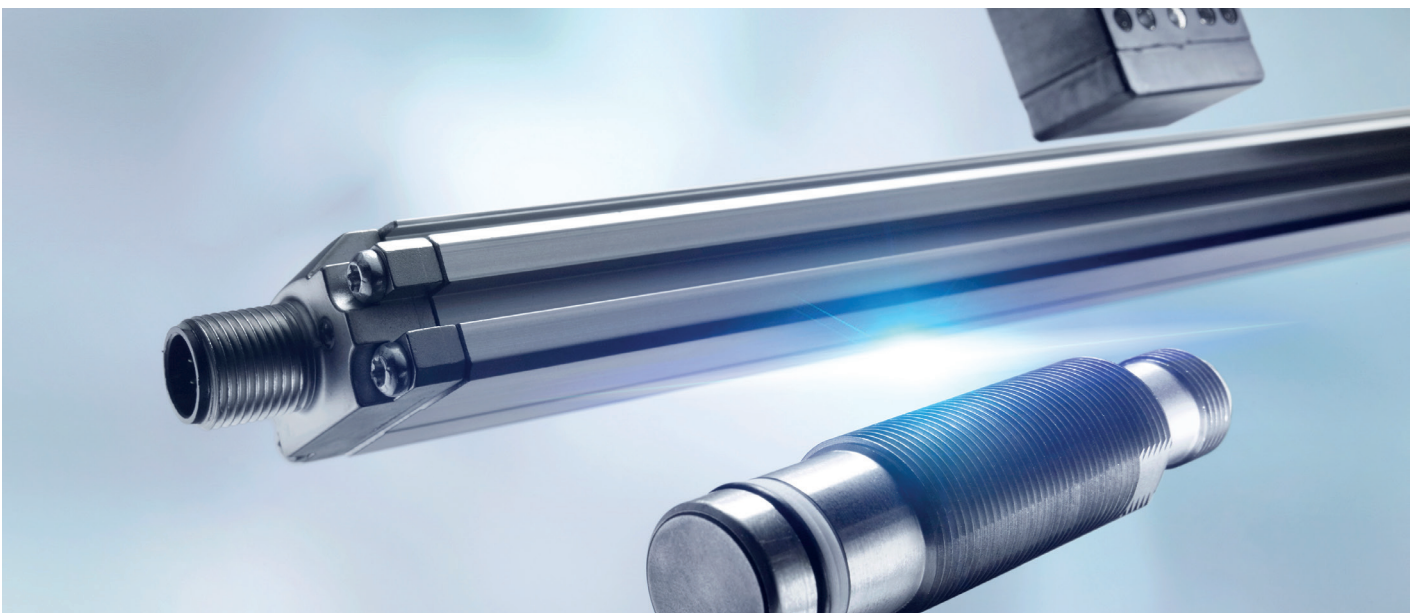
- Regular software and security updates in three-month release cycles
- State-of-the-art cloud data centres with high security standards and access performance
- Flexibility in customisations and expansions, as well as interfaces with other tools
- Integration capability for SAP systems

Customer experience

The foundation for better cross-area collaboration in sales, service, marketing and e-commerce

Outlook:

- Application Management Service (AMS): The trained and experienced staff at Sybit provide support and consulting on the maintenance, integration and continuous optimisation of the system landscape
- Integration of Balluff Service into the CX Suite by implementing the SAP Service Cloud
- Launch of the service ticket portal
- Connection of the marketing department to the SAP Sales Cloud



["Our requirements were very complex in places"]

Interview with Oliver Reichardt,
Head of Sales Application Management at
Balluff



Mr Reichardt, can you describe the fundamental challenges and goals in your work at Balluff?

That certainly includes the safe handling of data. Many of our customers operate internationally. Our task is therefore to provide our customers with the best possible support world-wide and to offer them consistently high Balluff quality: in our products, as well as in our consulting and service. We see this reliability as essential for a good partnership. A CRM system supports this kind of collaboration. We address current problems, but also future issues. By digitally networking our sales and service teams, we're able to more effectively handle the needs of our customers around the world and be there as a partner for them.

What were the highlights of the Sales Cloud project for you?

It was exciting to see real data in the system for the first time. Not test data, but real Balluff data! And then the go-live in Austria, of course, which a colleague and I were present for. Will we meet the user expectations? Does everything work? Is the migration a good fit?

And?

It went very well with no issues, and the teams involved were satisfied.

What were the challenges beforehand?

The coronavirus pandemic obviously had an impact. At the start of the project, we met regularly and had large on-site workshops with lots of participants. All of a sudden, none of that was possible anymore. But here, too, everyone involved reacted flexibly. We quickly found that everything worked remotely, and highly efficiently at that. We were able to carry out the project with no delays – and we managed the complete roll-out phase with everyone working remotely.

And from a project perspective?

The data cleansing and migration were a challenge there. Data cleansing was an important topic, and the risk of duplicates was high. Identifying the duplicates in advance is a science in its own right. Nevertheless, that part also worked well in the end. As did the adaptation of long-standing, very specific functions from the old system. Some of our requirements were pretty complex.

Why did you decide to choose Sybit as a project partner?

My background is in IT and project management. We've always had Sybit in mind when it comes to CRM issues. It is especially important for medium-sized companies like us to have project partners that are neither too large nor too small. With the former, your needs may not get the attention they deserve – and the others have too little experience. We also considered other SAP partners. When we made the decision, we felt that we were in good hands with Sybit and that the team brought a wealth of expertise and experience in the C4C and ERP environment as well as in project management. This feeling proved to be correct. The colleagues from Sybit were flexible, focused, always coordinated and easily accessible.

How did the collaboration go?

The workflow and documentation were very structured, and the implementation proceeded as quickly as we had expected. It was a partnership-based cooperation on equal footing, and they didn't just tell us what we wanted to hear. We approached challenges with various solution approaches and critically assessed our requirements. Feedback like this is important in order not to spend money in the wrong place. The agile project method was new for some colleagues, so the detailed introduction we had was the right approach. And now the Scrum method and Jira have also become established in our company.

Your conclusion?

I consider commitment, professional approaches and partnership-based cooperation crucial for a successful project. Sybit shows all these qualities, and this underlines their competence in reliably and successfully implementing demanding (C4C) projects.



Balluff

Balluff is a medium-sized company founded in Neuhausen auf den Fildern near Stuttgart. As a family-run business for four generations, it has grown into a sophisticated global leader in its field. An established sensor and automation specialist with long-standing customer relationships – that also acts as an important innovation partner and trendsetter for its customers.



Sybit

Sybit is the ideal partner for integral customer experience management. As an SAP Platinum Partner and one of the top 20 digital agencies in Germany, Sybit develops solutions that incorporate all end-to-end processes in the customer journey. With its head office in Radolfzell near Lake Constance, Sybit employs over 270 people. Over 300 corporations and globally active medium-sized companies trust in the expertise of the SAP consulting firm.

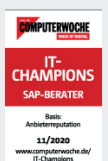
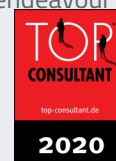
Do you have further questions? We look forward to hearing from you.



Jennifer Bertsche
Inside Sales Executive
+49 7732 9508-2000
sales@sybit.de

Sybit GmbH
St.-Johannis-Str. 1-5
D-78315 Radolfzell
www.sybit.de

We would be happy to support you from the first steps in launching a project all the way to implementation, integration, training and maintenance. Get in touch with us to make your next endeavour a success.



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