



**Salesfive**

# Phoenix Contact: Globally connected thanks to Salesforce

Thanks to a centralized Salesforce platform at Phoenix Contact, more companies than ever before can now work together globally and innovatively.



## Everything at a glance

Working in partnership with Phoenix Contact, Salesfive has succeeded in creating and rolling out a globally standardized CRM as part of the strategic digitalization portfolio.

After a greenfield design phase, in which an international team optimized and standardized the various core processes, the rollout and go-live took place in two pilot countries. Salesfive used the minimum marketable product (MMP) approach, enabling Phoenix Contact to quickly celebrate its first successes. Building on the experience and live performance of the system, the MMP is being continuously developed in parallel with the structured global rollout. As a result, a comprehensive CRM tool that is much more sophisticated than an MMP is now in use in nine countries.

Thanks to the new opportunities for collabora-

tion and increased transparency, the global CRM project has created a crucial basis for Phoenix Contact to achieve its ambitious growth targets for the coming years. Phoenix Contact accompanies its customers throughout their entire journey.

From the first point of contact to automated marketing measures and seamless handover to sales through to intelligent service processes, a globally valid standard has been created.

As any system is only as good as its use, change management was and is another important part of the project. Here, in cooperation with Phoenix Contact, we try to stay close to the users, obtain close feedback and communicate in a value-adding way.



## What we have implemented

- Conception of a central and preferably standardized platform on which all national companies in sales, service and marketing work together globally and thus obtain a 360° customer view
- Inclusion of global requirements and development of a comprehensive backlog with the help of international user groups to promote the global template concept
- Introduction of a standardized concept for an efficient and structured rollout procedure (seven countries went live in just six months)
- Support in setting up a local operations team for the prospective Phoenix Contact internal support of the live system

## Technologies



## About Phoenix Contact

Under a global umbrella brand, Phoenix Contact offers innovative products, solutions and digitalization expertise for the electrification, networking and automation of all sectors of the economy and infrastructure. The family-owned company thus supports industry and society in the transformation to a sustainable world with long-term growth prospects for all. The core business is organized into three divisions. In new business areas, the potential of digitalization, electrification and changing mobility is also being tapped beyond the core business. Phoenix Contact currently employs around 22,000 people and generated sales of EUR 3.6

billion in 2022. Production takes place worldwide in a manufacturing network in 11 countries with varying degrees of vertical integration. The Phoenix Contact Group has more than 50 sales companies worldwide, which ensure proximity to the markets and customers.

## The Challenge

As a result of the company's growth over the past 10 years and with a view to the future, the challenge was to be able to manage increasingly complex global sales processes collaboratively and holistically with a cross-border CRM solution. To a large extent, this is only possible if all national companies can work together and view their customers holistically. We were therefore challenged to develop a system with global relevance and at the same time achieve maximum user acceptance. „Collaboration, transparency and efficiency“ were and are the three leading objectives of the global CRM project. Seamless international collaboration and customer centricity, including for global accounts, were just as big a challenge as change management. The biggest task here was to implement long-established, local processes globally and to make users receptive to the overarching goals in order to achieve a high level of system acceptance.

In order to keep localization in the countries to a minimum and to roll out the system to the subsidiaries as quickly as possible, a rollout procedure had to be created that

- compares the previous processes with the system image in defined steps,
- identifies indispensable local necessities and
- efficiently migrates the relevant legacy data in the respective country.

Based on the experience of the pilot rollouts, we were able to develop a template that still offers enough flexibility for the different complexities of the countries.

## The Solution

As a global CRM platform, Salesforce forms the foundation for Phoenix Contact's planned growth. In addition

to the technical implementation of the functionalities, we have above all succeeded in bringing the previously locally operating national companies closer together and standardizing and harmonizing processes. All of this was implemented using an MMP approach and successfully rolled out in two pilot countries.



## Change-Management

In this project, we were not only required to design the corresponding IT architecture and introduce the necessary software solutions, but also to support the internal change management at the traditional company in its transition to a global group. In particular, the aim was to demonstrate the advantages of the new „IT world“ and closer cooperation to the employees in the national companies, even if this meant the end of familiar procedures. To this end, Salesfive condensed the diverse methods of change management into the relevant building blocks at Phoenix Contact and provided support in the area of stakeholder engagement in particular.

## Marketing

Salesfive introduced Marketing Cloud Account Engagement to map marketing automation processes. Clusters were formed for this - taking into account the local proximity of the national companies to each other - in order to exploit synergy effects. With the introduction of Marketing Cloud Account Engagement (formerly Pardot), we were able to provide a standardized solution for lead management and at the same time replace analogue manual processes with automated digital

ones. Salesforce thus forms the central platform for lead management at Phoenix Contact, on which the marketing and sales departments can work even more closely together and a seamless transfer of prospect data is ensured.

## Sales

In order to fully map sales processes, it was necessary to connect the ERP systems to Salesforce. Thanks to an integration architecture in which we designed and used interfaces (APIs), we are able to integrate both globally and locally managed data masters with Salesforce. In particular, the regular exchange of account master data between CRM and ERP systems is a fundamental functionality.

In sales at Phoenix Contact, the main focus is on identifying projects across national borders and giving sales employees a corresponding view of them. This has been successfully implemented in opportunity management and global collaboration has been strengthened as a result.

Salesforce CPQ was introduced as a quotation tool to round off the sales digitization initiative.

The following measures were successfully implemented:

- Implementation of Salesforce CPQ, including real-time price condition queries via ERP integration
- Expansion of Salesforce CPQ functionalities through the integration of an external configurator
- Implementation of a globally valid and multi-stage approval process

## Service

The successful rollout of the Salesforce Service Cloud completes Phoenix Contact's 360° view of its customers. Inquiries via various channels such as email and telephone are recorded directly in Salesforce and automatically assigned to the right contact person. This ensures that customer inquiries are processed as quickly as possible. In addition to the usual service

processes, a handover process was implemented for escalation cases, which strengthens collaboration between the headquarters and the local subsidiaries.

The connection to the ERP system for processing returns and the integration of a corporate knowledge database as a tool for employees are important components of the service processes.

## Rollout

As part of the collaboration, we have rolled out nine national companies so far, starting with a pilot in two countries in Europe. We attached great importance to directly developing a scalable global template that would enable us to continue rolling out the new platform efficiently and successively in the national companies. In order to exploit synergy effects, so-called „clusters“ are formed, i.e. several countries with similar requirements are grouped together and rolled out jointly. We also looked at KPIs that allow us to understand the extent to which the system has been accepted after a go-live in the respective country. This enabled us to establish a very high level of user acceptance immediately after a rollout.

## Training

A key success factor for a successful rollout and good user acceptance is a methodically targeted training concept. To this end, it is important that, in addition to our experts, Phoenix Contact employees are also actively involved in the training courses in the countries in order to explain local processes and their implementation in Salesforce in the best possible way. For this reason, we defined so-called „key users“ in each country at an early stage, who played a decisive role in the development of the country-specific template from the outset and independently drove forward specialist topics. Shortly before the go-live, they were therefore able to carry out the training sessions with the support of one of our technical experts in the background.

## Project Management

Our program management team has overall responsibility for the project. This includes, for example, managing the entire Salesfive project team as well as cost control and coordination of all cross-project control measures. These are tackled in close cooperation with the relevant counterpart at Phoenix Contact. In addition, the project management office provides support with project organization, controlling and other administrative tasks.

## Outcome

As part of a digitalization initiative, Salesfive has made a significant contribution to bringing Phoenix Contact much closer to its vision of the „All Electric Society“. We have grown together closely with the Phoenix Contact project team and meet as equals. As the driving force, we coordinate the numerous sub-projects and ensure that milestones are reached on time.





## Would you also like to...

- manage complex business processes from a central platform?
- enable all departments in your company to have a 360° customer view?
- make the transition to a new IT system as easy as possible for your employees with targeted change management measures?
- have an IT structure that grows flexibly with you and your company and offers you sustainable business growth?

We know the challenges faced by medium-sized and large companies in the manufacturing industry. We bring this knowledge from numerous implementation projects to your digitalization project. Let us advise you now, without obligation, on what is possible!

## Your direct contact to us



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