

Kleimann & Liebherr Hausgeräte: CRM-integrated sales control

Complete solution for Liebherr's authorised representatives

„When I visited the trade fair Sales Tech, I was kind of looking for a chicken which lays golden eggs, which, of course, didn't exist on the market. At PTV's Sales Tech booth Detlev Kleimann, owner of the commercial agency Kleimann, discovered the software solution PTV Sales&Service. It wasn't a standard solution, but Thorsten Frerk, a PTV senior sales consultant, spontaneously outlined an overall solution consisting of different standard modules: PTV Sales&Service for sales & trip scheduling. Genesis-World, the CRM groupware made by CAS, for internal communication processes. It manages all contact data and schedules all appointments.

User: **Kleimann**, Neu-Isenburg, Germany, authorised representative of **Liebherr Hausgeräte GmbH (household appliances)**, member of the Liebherr Group. Liebherr technology is firmly established in the world of building construction and civil engineering as well as construction machinery.

Task: Complete system for sales control and sales trip planning, linked to a CRM tool which communicates with a material management system to which all employees have data access.

Solution: Innovative modular complete solution including PTV's GeoManagement system PTV Sales&Service for sales force control (sold under the new brand name **PTV Map&Market/Premium** since October 2007) combined with CRM software.

Data transfer to the Liebherr product management system "Material Management" from All-for-One was established in order to avoid double data management. This was the job for the Pollack software replication module PS-Ware which dynamically integrates and matches the customer data for the different systems.

Liebherr is open to innovative solutions

The complete project was presented to the fourteen German Liebherr authorised representatives. Finally four more pilot customers, including Kleimann, were won for this project. Walther Kohlmaier, general manager of Liebherr Hausgeräte, explains: "The German traders can independently choose their computer systems. However, Liebherr Hausgeräte GmbH thinks that a standardised solution is more efficient. Right from the beginning, one of the pro-

ject's aims was the positive effect on the other authorised representatives."

Fair district and trip distribution for everyone

Every month the CRM Groupware delivers all sales trip data. PTV Sales&Service was used to optimise the district distribution and to achieve an even capacity utilisation. The program takes conditions such as the number and duration of trips or trips to specific electronic retailers into consideration.

Every four weeks PTV Sales&Service plans the sales trips based on the current data which is transferred to the genesisWorld calendar. The individual calendars are up-dated and sent to the sales staff, even to their Palm Handheld. In addition, the representative can enter information on not having met his customer. This information will be taken into account for the next trip planning.



Kleimann is very pleased: "The advantages are tremendous. The trip planning saved ten percent of travel expenses – PTV Sales&Service paid off quickly for us. Finally, the trip planning for my sales force is clear and efficient. They no longer have to plan their trips, but still have the option of editing their trip planning. So I am always informed about who goes where and when. The complete solution is a very powerful sales instrument for a small sales company like ours, allowing us to achieve high performance with restricted personnel. In my opinion, this complete solution should be on the agenda for all kinds of sales companies."