

Spartan Controls finds the right CRM partner in SalesProcess360

For over 60 years, Spartan has been providing customers with high performance solutions, industry expertise, lifecycle support, and technical training. Additionally, customers are relying on more supplier support. Spartan needs a CRM tuned to their changing business requirements. One that can create a digital platform for resource coordination, customer engagement, log customer requirements, and provide better visibility and transparency to the entire organization.

“WE MADE CRM A CUSTOMER FOCUSED PROJECT AND WE FOUND THE RIGHT PARTNER WITH SP360” -Kelly Rath, Sales Manager

To embark on the CRM journey, Spartan assembled a dedicated team of internal stakeholders who selected SAP C4C as the CRM solution due to its integration capabilities with their existing SAP ERP system. However, they learned from past experiences that treating the CRM implementation as an internal IT project was insufficient and must include more external customer-driven requirements.

The turning point came when Spartan encountered Brian Gardner from SP360 at an Emerson Growth Planning Meeting. Brian's extensive experience in successful CRM implementations within the industrial market made him an asset for Spartan. “As a consultant, Brian was asked to lead the overall project as a wingman to the internal CEO for CRM,” said Adrian Vickers, Vice President at Spartan Controls. “He’s our advocate, he understands our organization and our needs. More than that he thinks like a Spartan and with over 25 years of CRM experience in our market, Brian knows how to tune the system and unlock its full potential.”

After completing the audit and meeting with key stakeholders, Brian laid out a detailed plan including SP360's 3 pillars of success: Project Design Assurance, Project Execution Assurance and Onboarding to support the full CRM lifecycle. “He clearly understands Spartan’s journey and the nuance of our industrial sales channel,” said Kelly Rath, Sales Manager at Spartan Controls. “Working directly with sales leaders as well as the technical team, Brian bridges the gaps between business needs and converts them into requirements for the technical team.”

The challenges and business issues addressed by SP360 included:

SP360 begins with an audit of the current situation to determine stake holder needs, key processes, and CRM performance gaps. Once the needs and processes are clearly identified SP360 creates a road map for implementation. The key problems and business issues to solve are:

- **Better internal communication and coordination of resources** – With so many people in various roles, regions, business segment, account ownership, etc. there are many customer needs to capture. To coordinate effectively, Spartan requires a system where information is

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Helping Companies Get ROI from CRM

consolidated and shared quickly so it can be leveraged throughout the organization providing maximum customer value.

- **We need to learn from our strategic pursuits** – Why did we win or lose and what did we learn? Did we create the right customer value?
- **More efficient territory transitions** – When someone moves on, or when a new employee comes aboard, it's important they on-board quickly and efficiently. Before, this generally took many months. By having a centralized database of customer and regional data, we can facilitate the process. Territory plans, relationships, and various customer roles are quickly captured and accessible to the new employee. In the end this is a better customer experience.
- **Creating a positive digital experience for our customer and us** – “We help customers digitize their plants, so they expect an effective digital experience when they interact with us,” said Whitney Eberly, Account Manager, Spartan Controls. “With the database of roles and responsibilities customer requests are routed and processed quickly.” Now we direct resources to the right business issues at the right time.
- **Best practice** – To improve on a high level of customer satisfaction, Spartan needs a place to host best business practices. “Digitizing these processes makes them accessible to everyone and that makes them easy to use,” said Kelly.
- **Source of truth for data management** – “Moving data from a salesperson decentralized laptop to a centralized database including the mapping of locations, headquarters, connecting accounts, etc., together creates a *source of truth* for account responsibility,” said Brian Gardner. “Account hierarchy, parent child relationships are clear, and all the data is organized to support the customer and making good business decisions.
- **Changing the future means changing the culture** – As with most technology adoptions, Spartan requires full adoption, from senior management and throughout the organization. Training and coaching are a continual process at Spartan. “We really appreciate how Brian has led the way to ensure training on this system is done right. Not just a one and done, but he looks to improve on it every time and with emphasis on the **Why CRM** not just the **How**” said Adrian. Web training is recorded to provide a digital handbook for future employees.
- **Create user defined dashboards** – Dashboards create visuals of key metrics by role promoting actionable task management. “Timing is important for adoption,” said Adrian. “These are modern enablement tools. Our teams see the benefit and they are bought in. “

“The decision to bring in a consultant and a wingman for the internal CEO for CRM, proved to be the right one. Having an expert like Brian of SP360 asking the right questions won over the sales team easing overall system adoption,” said Kelly. Having a detailed implementation road map addresses performance gaps with actions to close those gaps. SP360 knows where all the speed bumps are, and they have proven tools and processes to ensure a successful CRM journey.