bpm'online

PELCO
by **Schneider** Electric

Pelco by Schneider Electric Chooses BPMonline to Automate Sales in 26 Countries

Pelco by Schneider Electric selected BPMonline to deliver an integrated global sales forecasting and opportunity management system to leverage across 26 countries. BPMonline delivered an on-demand solution to improve sales visibility including integration with Pelco's order management system ("BOSS") used by a global product and service distribution channel of over 20,000 distributors (in 130 countries). The system has become operational in 8 weeks, providing greater forecast accuracy, better conversion of leads to opportunities, and more effective collaboration between Pelco's direct salesforce and its distributors.

Challenge

Prior to BPMonline, Pelco's sales were managed through BOSS where resellers/distributors accessed product information, submitted orders and tracked shipments. Pelco's growth and size of its channel required a more complete sales management system in order to efficiently manage all opportunities and sales pipeline. This would allow Pelco to have access to meaningful and detailed information on all leads and opportunities and deals, including: average size, sales stages, real-time updates and win rates.

What was missing

- No CRM system to understand quoted order status
- No sales forecast visibility outside of North America
- Limited sales support for a global distribution channel
- Limited information on partner and product profitability
- Limited sales data provided by a mission critical global order management system
- No analytics and reporting to track real time sales performance worldwide

What was required

- Clean and intuitive interface that would allow saving time on training
- Easy integration with Pelco's operational system and other third-party applications
- Comprehensive analytics and reporting to track real time sales performance
- Speed of implementation – the project was very time-sensitive

Implementation

Pelco implements
BPMonline CRM
in 26 countries
across 5 continents
in only 8 weeks
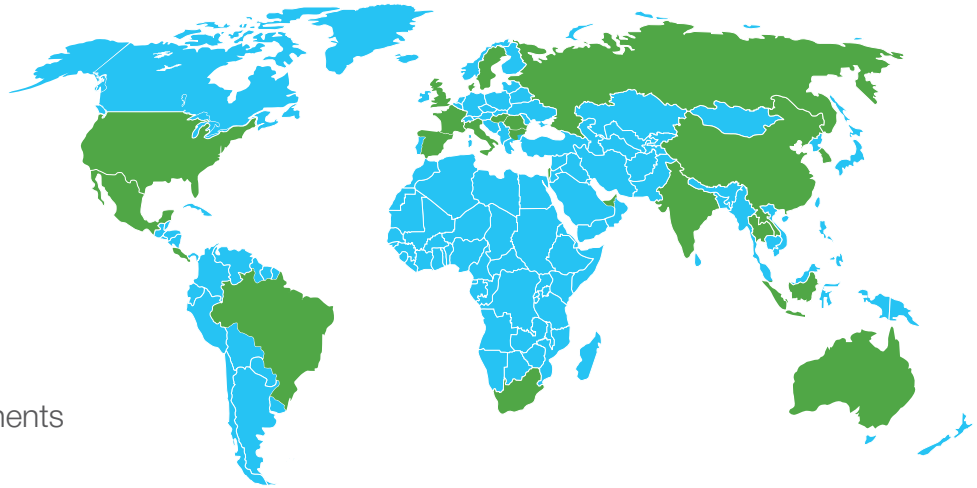
Having analyzed several vendors, Pelco's stakeholders decided to implement BPMonline CRM globally in 26 countries and across five continents. Eventually, it took only 8 weeks to bring BPMonline CRM into Pelco's everyday operations, which included product installation, all customizations and staff training.

"We now have an opportunity to see how we can scale our business across the globe. BPMonline provided us with an enterprise CRM system with built-in workflow and BPM tooling to integrate our order management system with customized business processes. Our global sales employees are going to be more successful with the support of this solution."

Alisa Wright, Program Manager at Pelco by Schneider Electric

Seamless Integration

While Pelco's channel still uses BOSS to get product quotes and register orders, Pelco's sales teams use BPMonline to manage the channel sales and report on its efficiency and effectiveness. Data entered in BOSS by the internal global sales team automatically creates an opportunity and a relevant business process to launch in BPMonline CRM which is managed from lead to closure. Real-time orders and quotes automatically create opportunities – complete with product specifics, quantities, pricing, contact, and all other relevant sale information.

Opportunity and Pipeline Management

The integration of BPMonline CRM with BOSS provides many benefits to Pelco's sales reps and management. Opportunity management features instantly classify each deal by region, type, volume, conversion and probability. Smart sales parameters define sales process rules to follow and automate tasks and activities, minimizing manual intervention and possibility of an error. Smart charts and reporting provide crucial sales data used to understand the health of the sales pipeline and forecast actual results against plan. The data is presented to maximize insights into the sales process.

Teamwork

BPMonline CRM captures detailed profiles of each partner, including: all opportunities and quotations submitted, and sales statistics. Sales teams also are automatically assigned to manage deals. For example, if the size of an opportunity exceeds a predefined limit, a report is automatically sent to Production team to ensure production and stocking will meet the required demand in specific regions. Sales managers have greater visibility into each deal and can more effectively manage each sale.

Analysis and Forecast

BPMonline allows for quick and accurate real-time sales analysis and forecasting and provides visibility into efficiency of each sales manager and territory. Management can also build dashboards to track real time sales performance. International project analytics were introduced as key sales operational data for the first time.

Project Timeframe

8 Weeks Challenge									
Milestones vs. Weeks	1	2	3	4	5	6	7	8	
Design of CRM-System. Concept. Interface. Customization	███	███							
Business Process Setup. Integration Development			███	███					
Reports Design					███				
User Permissions Setup						███			
Testing & Trainings							███	███	
Operation. Support. Roadmap Review. Roadmap development.									███

Outcomes

The BPMonline solution was operational and sales reps and managers trained in 8 weeks.

- The system was fully adapted to Schneider's corporate sales techniques and standards.
- Seamless integration with BOSS automated vital sales processes, providing forecasting and sales planning.
- Sales data was structured into meaningful segments with multi-level role hierarchy.

"This was a perfect situation to showcase how the BPMonline platform takes the fear out of legacy integration. Pelco needed something fast, customizable, enterprise, and global. Something that pulled together disparate system and processes and standardized them for scale. We delivered and this solution will evolve for them as they evolve their market strategy and growth."

Ted Hartley, BPMonline Vice President, Americas