

Performance Made Connected: Automated Marketing and Sales Management Drives Success

The Company: Global Leader in Optical Sorting Technology

A division of Bühler AG, Bühler Sortex Limited (Sortex) designs, manufactures and distributes optical sorting machines for commodities such as rice, coffee, peanuts, tree-nuts, beans, pulses and seeds. Sortex also offers sorting solutions for grains, snack-foods, confectionery, breakfast cereals and plastics. The company's color plastics sorters are rapidly becoming an industry standard for the plastics recycling industry.

Sortex has sales offices around the world and more than 20,000 installations in over 100 countries. Founded in 1947, Sortex has been honored by the Queen's Awards for Enterprise on multiple occasions, and received the United Kingdom's National Business Award in 2004.

The Challenge: Data Disarray Immobilizes Sales

Like most manufacturers, Sortex faces intense global competition: "We export about 95 percent of our products. Our competitors come from all over the world — the United States, Europe, Japan, China — we all go after the same markets. So, we have to be fairly structured in the way we approach our customers," says Charith Gunawardena, the company's marketing director.

However, the company's extended network of in-house account executives and external sales agents were wedded to the different spreadsheets and databases. An integrated approach was impossible, stifling growth potential.

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Charith Gunawardena, Marketing Director, Bühler Sortex Limited

The data was duplicated, and accuracy was very low," says Gunawardena. "We tried to do a Microsoft Access database centrally, but it wasn't very effective because no one could log into it remotely."

Sortex equipment is a capital investment, and the sales cycle can be 12 months or longer. To nurture prospects and customers through the sales cycle, Sortex needed the ability to easily and accurately segment customer data and execute targeted campaigns. Just as critical was the capability to foster close customer relationships post-sale and ensure that customers would return to Sortex for maintenance plans when their sorters were out of warranty.

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"We had very challenging growth targets; unless you have a very structured sales process, it's difficult to manage that growth. The challenge was to manage the growth process, and we needed CRM to support that," says Gunawardena.

Sortex reviewed a wide variety of CRM systems, including Tier I options. The company found the perfect fit with a CRM system from Bisgen, since acquired by QAD. Sortex went live with its CRM solution, now QAD Customer Relationship Management, in 2004.

The Solution: Taking Control

Gunawardena points out that successful CRM initiatives are a collaborative endeavor between marketing, sales and the Information Technology (IT) groups. "This is not an IT-led project. We [marketing] set up the data, the segments, the business reports."

Email synchronization capabilities allow account executives or sales agents anywhere in the world to synchronize data with the main office in London. An agent at a hotel in Thailand can access the system from a laptop

and update information on the central server. Regular alerts prompt the global sales force to synchronize with the central office, ensuring that data is kept current.

As a simpler alternative to in-house application management, Gunawardena began outsourcing the management of his CRM application to Bisgen. Now engaged with QAD Application Management Services (QAD AMS), he finds that outsourcing application management to the software provider gives the application developer a clear understanding of user needs that results in better service and solutions.

“The rollout and culture change have to be managed very, very well. The tool will work as well as you roll it out. From a technical point of view, the system can do really useful things.”

Charith Gunawardena, Marketing Director, Bühler Sortex Limited

Sortex has a dedicated application manager handles technical problems, data de-duplication and reporting, as well as rolling out campaigns. “They are very familiar with our exact company needs,” he states, adding that the application manager “is an integral part of the Sortex marketing team.”

The Benefits: Information + Automation = Sales Revenue

With QAD Customer Relationship Management (QAD CRM), Sortex continues to radically improve targeting, sales opportunity tracking and customer support. This more cohesive, structured approach to managing leads, campaigns and customer data helps Sortex lead the global competition. “Now we have something that’s well-organized,” says Gunawardena. “From a marketing point of view, these are essential tools for me.”

“We are now able to create many more sales leads than ever before, forecast to an acceptable level of accuracy and obtain real-time management information critical to the success of our business,” says Gunawardena. “We can see hundreds of different projects happening around the world — that visibility is huge,” he adds.

QAD CRM seamlessly connect territory managers in London and their regional sales teams around the world. “The territory managers in London are able to see the activities of their sales teams around the world. And it helps them to plan their strategies, track their sales targets and view activities of the account executives in the regions,” says Gunawardena.

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Current, complete, accurate data, along with the ability to easily segment by industry and commodity, empowers the Sortex marketing team to do more sophisticated promotion planning and campaign execution. Contacting the right segments at the right time, combined with the background information needed to make compelling offers, makes every campaign more productive. Targeted lists are built directly from QAD CRM, and direct mail and email campaigns are executed from the system. “Very quickly, you can see how effective a campaign has been,” says Gunawardena. “It certainly helps to measure the return on promotions.”

Now, leads are easily tracked from the initial campaign, straight through to the sale. And, when sorting machines come out of warranty, the system automatically generates reports that alert sales professionals to opportunities to sell service packages.

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Charith Gunawardena, Marketing Director, Bühler Sortex Limited

“The system also helps in terms of forecasting: If there are lots of opportunities available, you can see a good sales pipeline very clearly. We have a very complex product range. It’s essential that we are able to forecast,” says Gunawardena. He comments that information generated

by the CRM system has a direct impact on product and production planning. "Opportunities in the pipeline give an indication of what we should be making in the future," he says.

Gunawardena sums it up best: "Marketing activities have to be market-led. From a marketing point of view, you have to have a clear idea of what the market wants: Who the customers are; which areas they operate in; how often they buy machines and when; who are your highest-value customers in terms of revenue and frequency of purchase; what exhibitions they go to; how many promotions have we done to them. All that you can do from QAD Customer Relationship Management."

The Future: Continuous Improvement Fuels Momentum

Along the way, Gunawardena has been addressing change management with the Sortex sales team; many were reluctant to give up their personal databases at first. As members of the sales team have experienced the benefits of the new system, they are now clamoring for additional functionality. And Gunawardena plans to give it to them, with an upgrade to the next release of QAD CRM, planned for 2008.

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"The rollout and culture change have to be managed very, very well. The tool will work as well as you roll it out. From a technical point of view, the system can do really useful things. It depends on how you roll it out from the operational side, and that's the biggest challenge," says Gunawardena.

"We are on track to achieving much more structured information. It's a slow process to get there, but these are essential steps we have to go through."

Highlights

Company

Company Name	Bühler Sortex Limited
Industry	Industrial Manufacturing
Products	Optical sorting equipment for agricultural commodities and plastics

Solutions

QAD Enterprise	QAD Enterprise Applications (MFG/PRO eB2 SP)
Applications	QAD Customer Relationship Management
Hardware	HP 9000
Environment	UNIX
Languages	English
Number of Sites	Three
Time-to-Benefit	12 months

Results

- All customer and prospect data consolidated into one, central data repository
- Single view of each customer/prospect across the organization
- Any sales rep, anywhere in the world can easily synchronize data with the main office in London
- Leads tracked from the initial contact or campaign to close
- QAD Application Management Services (QAD AMS) simplify managing the application
- Continuous improvements in targeting, sales opportunity tracking and customer support.
- More sales leads created than ever before
- Accurate forecasting
- Real-time visibility to critical management information, campaign activity, sales pipeline
- Fast and easy measurement of campaign effectiveness and return on promotions
- Positive impact on product and production planning