

Helopal Lottmann Case Study

About Lottmann Fensterbänke GmbH

Lottmann Fensterbänke GmbH develops and manufactures windowsills made of cast marble and sells these internationally under the helopal brand. This family-owned company with 75 personnel manufactures over one million meters of windowsills a year and generated sales revenues of €14m in 2011. The helopal-Group consists of branch offices in 7 European countries.

The Challenge

The company has been using the ERP system Microsoft Dynamics AX for many years and which was implemented by its long-term ERP partner FWI Information Technology. It is used by every department, including sales. However, the solution was impractical for sales representatives as it is often difficult to establish a VPN data connection to the company when on the road, making it difficult for the sales representatives to access important information at any time as required.

Our Answer

FWI Information Technology implemented the mobile CRM solution Microsoft Dynamics CRM for Lottmann sales representatives, based on the native application Resco Mobile CRM. The solution is available on iOS (iPad) and was adapted to the CRM system by FWI using a dedicated admin tool. The entire customer management process is displayed in the mobile system and can be accessed at Lottmann using iPads.

Success Story

"We maximized the benefits within a short space of time and have received consistently positive feedback. The mobile CRM system enables our colleagues on the road to save two hours of working time every day,"

Markus Salzwimmer, IT Project Leader at Lottmann Fensterbänke GmbH.

While the in-house staff only uses the ERP system, sales representatives now take advantage of the mobile CRM solution. It doesn't matter where they are or if a data connection is available or not – sales representatives now have immediate access to the information they need via iPad thanks to Resco Mobile CRM. Both the in-house staff and sales representatives access the same set of data (customers, contacts, orders, invoices) as these are bidirectionally synchronized between the two systems. Having to jump between systems to obtain relevant information is now a thing of the past. This has made the work easier and more efficient for all those concerned, and even the sales management team benefits thanks to automated reporting and information processes.

