



CAPS Increases Responsiveness to Customers With Customized CRM Infrastructure



Vital Statistics

- Seller of products, services and support for UPS, power conditioners, generators and HVAC
- Based in Santa Clara, CA, USA
- <http://www.caps4ups.com>

Business Challenges

- Eliminate time-consuming “paper handling” and Excel-based processes – automate processes from campaign management to proposal to invoicing to customer support case management
- Gain visibility with better business reporting
- Have a solution that is native salesforce.com functionality to reduce on going management costs

Solution

- QuickStart to automate sales processes
- Evaluation, set up and integration with Conga by AppExtremes to automate quoting process
- Evaluation, set up and integration with FinancialForce.com accounting system
- Training and handoff

Benefits

- Quotes can now be generated in 20 minutes instead of hours. Existing customer quotes can be generated in 2 minutes
- Pipeline visibility is instant instead of monthly
- New system enables CAPS to add even more products to its mix and explore new service offerings for customers

BACKGROUND

Founded in 1982, Computer Air/Power Systems, Inc. (CAPS) is an industry leader in sales, rentals, and service of quality uninterruptable power supply systems (UPS), power conditioners, generators, and HVAC that reduce or eliminate damaging power disturbances on mission critical systems.

CAPS delivers complete solutions to North American companies, providing new, pre-owned and rental equipment and services to a variety of industries that depend on critical systems.

“The critical power industry is big and complex,” said Erick Sturm, VP of Marketing at CAPS. “We partner with over 50 suppliers of power-related systems and have a team of sales and implementation experts that advise our customers on the best price-for-performance solution to their specific needs.”

CHALLENGES

Due to its fast growth, CAPS sales infrastructure was dependent on Microsoft Word, Microsoft Excel for sales and a paper-based system for back office processes. They wanted to automate their processes by instituting a customer relationship management (CRM) system to better handle its prospect and customer interactions. Specifically, CAPS was looking for the following:

- Automation of lead, prospect and quoting process
- Ability to perform “what if” analysis for proposals

- Integration with an enterprise resource planning (ERP) and financial system
- Visibility of pipeline for forecasting

“Our customers depend on us for fast, accurate and expert assistance,” said Erick Sturm. “Our goal of improving our CRM infrastructure will enable us to provide significantly better service to our customers and future customers. We’ll be able to put together better bundles and packages for our customers and to be more responsive to our customer needs.”

SOLUTION

MondayCall Solution’s QuickStarts begin with discovery sessions of key stakeholders. Working with CAPS management, MondayCall understood the key business drivers in order to create prioritized requirements. The next phase of the project was to create a best practices design based on the requirements and to iteratively build the system so that CAPS could see progress and provide feedback early in the project. Based on the requirements, MondayCall Solutions also advised on the best third party tools to use to meet the requirements. Integrations with third party tools like AppExtremes Conga (for quoting) and Financial Force (for ERP and finance) were also conducted as part of the process in order to create a complete solution.

Once the solution was completed, MondayCall Solutions trained both the CAPS field and CAPS back office teams and did a proper handoff to the future CAPS system administrators so that they could manage it in-house.

“The MondayCall Solutions consultant we worked with was fantastic. He was highly capable, very responsive and was always looking out for our best interest: to find solutions that met our demanding requirements and save us money.”

- Erick Sturm
VP of Marketing at CAPS

BENEFITS

CAPS has gained a number of new benefits since deploying the newly configured salesforce.com in their environment:

- A highly efficient sales process that enables CAPS to respond faster to its customers. Instead of using Excel, they are able to better prototype different customer packages and adjust pricing to provide the best solution fit for the customer. Quotes for new customers used to take hours but now take **20 minutes**. Quotes for existing customers take **2 minutes**.
- Pipeline visibility used to occur only at the end of each month when Excel spreadsheets were rolled up. Now, sales management can get **up-to-the-minute** visibility into the pipeline and get significantly accurate forecasting as a result.
- With an improved infrastructure, CAPS is now able to further scale to add new products and services to its market offering.

“Salesforce, Conga, FinancialForce and MondayCall Solutions has made our customer engagement and back office process significantly more efficient. More importantly, our systems now give our team better data to make intelligent decisions faster. Our business wins when our customers benefit from our increased responsiveness.”

- Erick Sturm
VP of Marketing at CAPS

