



piaX[®] CRM in global use

Reference report on the use of the mobileBlox module piaX[®] CRM at Theben AG, Haigerloch (DE)

Theben AG is located in Haigerloch in Baden-Württemberg. At the headquarters stationed there were created revolutionary standards nearly 100 years ago. The Theben Group has ten subsidiaries that deliver to more than 60 countries, employing a total of 700 people. Theben AG customers enjoy a state-of-the-art range of smart home systems, digital and analog timers, motion and presence detectors, room and clock thermostats as well as components for the KNX building system technology.



Short info about the project: **theben[®]**

- Customer: Theben AG
- Industry: Electrical engineering
- Application: Sales
- ERP system: proALPHA 6.1
- Project data: In use since 12/2009



Initial situation & challenge

Theben AG has become the market leader in the field of electrical engineering for DIN rail mounted devices. To become a market leader is one thing, to remain as market leaders is different. Through this purpose, it came the shoulder-joint between mobileBlox GmbH and Theben AG. This cooperation has been in the closest confidence since 2009. With the success and globalization of the world, the need has increased, the contact management more efficient. The relationship with customers and partners has always been a high priority. However, traditional data maintenance and contact marketing only offered limited possibilities. The then IT management under Mr. Ringwald faced a challenge: Away from duplicate data management and towards a consistent collection of customer data in the ERP system proALPHA, MS Outlook and on mobile devices. Once this approach was implemented, it inevitably led to optimized sales opportunities - due to greater market knowledge.

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It makes no difference whether it is about the internal or field service - the software should enable all employees optimized data management. It was essential for Theben AG to find software that met these conditions. The goal was to uniformly optimize the sales process.

Solution

In order to meet the requirements, the applied ERP system proALPHA alone is no longer sufficient. At a decisive point, mobileBlox GmbH helps to achieve the desired success. With his specially developed module piaX CRM helps the software developer from Leipzig as longtime Partner of proALPHA AG to represent the interests of all parties.

The result of the close cooperation is the successful application of piaX CRM including the associated DMS system. And that works according to a proven scheme:

Sales opportunities are defined and filled using free text fields, completion probabilities, status, contacts, competitors, and associated offers. Subordinate sales campaigns in which the sales projects contain information about meetings, e-mail progress, Appointments, etc., can map the entire document chain in the proALPHA, including the associated documents. The employees of Theben AG thus have the possibility of downloading documents from the DMS, e.g. View off-line offers or last job offline and each other to provide communication and documentation are controlled by the internal and external service at any time, without media breaks or duplicate data storage.

Realized achievements

New external software often encounters employee rejection. Not so the piaX CRM module. The decisive instances of Theben AG have recognized the potential success from the beginning. The module has

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also achieved acceptance in the field and is understood as a supporting instrument. PiaX has enabled Theben AG to create a high degree of transparency in complex projects. Involved employees have now online and offline access to relevant data to the projects at any time. Above all, this facilitates the work of the field service by eliminating the double maintenance of data, thanks to the bidirectional synchronization with proALPHA. In addition, despite a long communication break, targeted sales approach can take place, appointments can be scheduled, or contacts can be maintained.

Conclusion and outlook

From the point of view of users and administrators on behalf of Theben AG as well as developers and consultants of mobileBlox GmbH, not only has the collaboration developed further. It became clear that especially the demands on the software have grown. Together, for example, was the further development of an object database defined and reached. Looking to the future, even higher requirement profiles are required to be defined, and other challenges are mastered.

The advantages at a glance



- ✓ Full integration with proALPHA
- ✓ Quick access to information
- ✓ Evaluable data
- ✓ Overview of processing status
- ✓ Assignment of tasks via the Activity Monitor
- ✓ Object lists with important information about the object
- ✓ Assignment of participants to the object / project

For more information, contact your proALPHA partner, on the Internet at www.piax.com or directly at:

