



:hager

CRM Software Gives Users the Ability to Monitor the Progress of New Strategies

Hager Group handles projects to construct everything from hotels to residential and office buildings. It is a technical field that's very much about people, relationships, and quality products and services.

Hager Group provides electrical solutions for buildings of all sizes – residential to commercial and industrial. Their wide range of products includes power distribution, cable management, floor systems, lighting, smart control systems and electric vehicle charging. While the group operates in over 100 countries, they still manage to maintain the spirit of a family-run business built on partnership and reliability.

Pavel Hanus is the Sales Manager responsible for implementing the CRM software in the company. Pavel implemented eWay-CRM not only to record the activities of his colleagues in the sales department, but even more importantly, to be a tool for strategic business management.

Why did Hager choose eWay-CRM?

The company began searching for a CRM solution for a branch office in the Czech Republic. In this search, Pavel Hanuš became familiar with several CRM systems, including the well-known solutions such as Microsoft Dynamics and Salesforce. Ultimately, their final decision was between eWay-CRM and Raynet, and they decided to use eWay.

There were several factors that contributed to the company going with eWay – what stood out to Pavel first was the approach of the Sales Director, who focused on Hager’s needs and goals with their new CRM system. It was immediately clear that he knows the software inside and out, and that he applies this knowledge to each customer’s specific use case. This approach continued into the implementation, where the Project Manager acted as a consultant tasked with setting up the best possible CRM system.

The next major factor in the decision, outside of the attentiveness of the team, was the simple fact that the software is a part of Outlook. Because of this, there was no need for the company to implement any other pieces of software, and the entire team was immediately able to work in one environment (not to mention, one that was already familiar to them).



Thus, the main reasons for the choice are simplicity and the CRM’s placement in Outlook. The company also appreciates the expertise, professionalism, and help with the implementation that was provided.

Taking eWay’s placement in Outlook – in combination with the expertise, professionalism and support of the team – into consideration, it was an obvious choice.

An implementation with several phases

Pavel had a clear idea of what they needed and had about 70% of their appearance and functional specifications ready at the beginning of their implementation.

Customization is one of the biggest advantages of eWay-CRM, and with all of the available options, it took some time to set up the project workflow and menus. For example, the company decided to merge the Deals and Projects module into one (i.e. into Projects), putting Deals as the first stage of the opportunity.

The Hager team spent a lot of time exploring the modules and available options during implementation. Through this process, the Project Manager continually helped to incorporate their requirements into the system and assisted with regular testing. After implementation was successfully completed, the Sales team completed the initial training, and eWay was officially rolled out to the team to use in their day-to-day operations.

Well-invested time

Estimated time for implementation was 2 months, but there were many changes, and the company gradually adapted the CRM to its own needs. The team already had experience with CRMs, so they tried to put as much information as possible into eWay-CRM. They also wanted to be prepared for possible staff changes in the future.

All in all, implementation took about 2 months, during which there were many, many changes and the company gradually adapted the CRM to meet their needs. Data was added to the CRM gradually and carefully. Before adding eWay, the team was using everything from Excel workbooks to Outlook events and reminders, to handwritten notes. Now, they finally had everything in one place. While the initial investment to implement eWay may have been greater than continuing to use these various tools, the increased organization and efficiency immediately brought savings.



What does the team think?

The users had a two-hour introductory training session with the Project Manager, which was followed by a round of minor adjustments. After the second (and final) training session, everyone was working in – and comfortable with – the software.

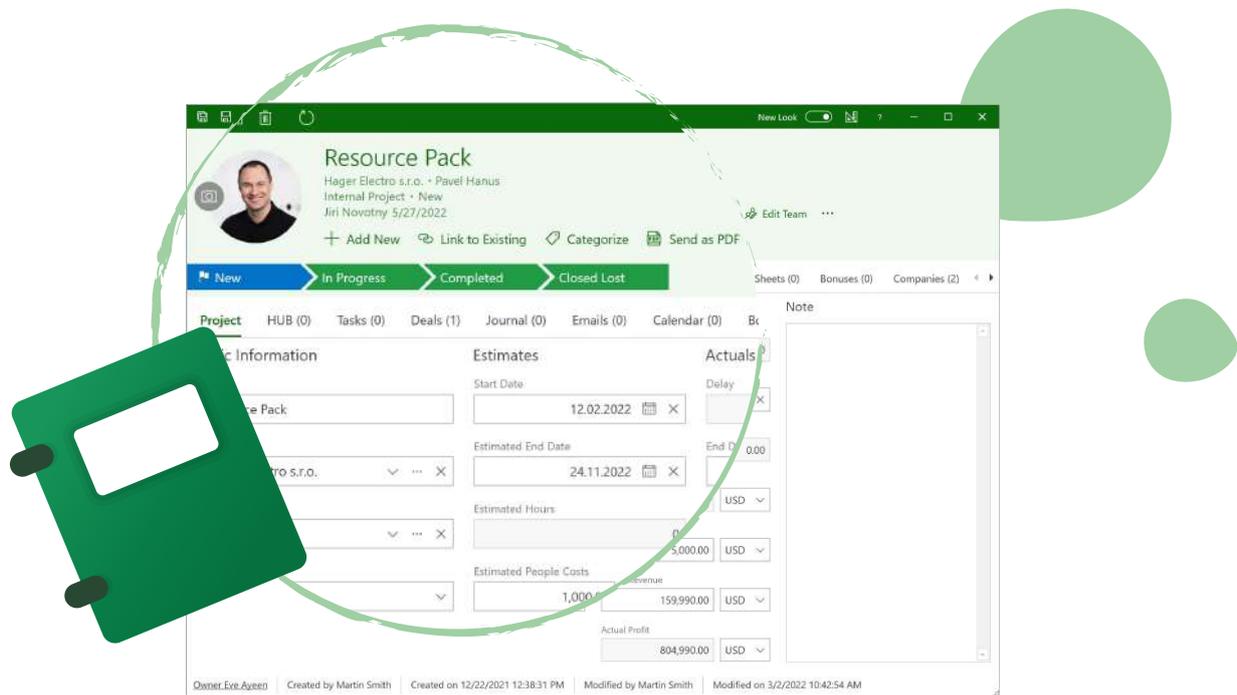
Hager keeps their data as open as possible. They have restricted the team from deleting records, but otherwise wanted the team to be able to easily access the information in the database. If the company ever wants to adjust the user permissions, it is a quick and easy adjustment within the Admin Center.

The Sales team focuses on adding concise and important information in eWay – limiting the amount of data entry time they need to spend in order to keep their information up-to-date. Meeting minutes helps the team efficiently track their time and attaching tasks to these records helps them stay on top of their next steps. Because of the way they use the system, each team member is able to recognize and plan around the needs of a client, at a glance.

What does a typical project look like?

Hager's typical clients are wholesalers, assembly companies, and switchboard manufacturers. Most of the company's business comes from proposals ranging between thousands, to tens of thousands, of dollars. Using the Projects module helps them to keep an eye on the status of these orders.

They also use the Projects module to track long-term projects, consisting of several proposals prepared in SAP. These projects can be in process for 2 to 3 years, and it is precisely due to these longer projects that the team has found the customizable workflows and interlinked records in eWay to be essential to their business.



What challenges lie ahead for Hager?

This year, the company has set the goal of focusing on yet another type of customer: electrical installation companies and developers. Fortunately, the CRM software will help them to track the development of the new strategy.

Even though many of their projects take a significant amount of time to implement – beginning from an investor's idea, and growing through the input of architects, developers and suppliers – Hager is confident that nothing will fall through the cracks because of their tailor-made, reliable CRM.

"eWay-CRM is simple, functional
and at a good price."

- Pavel Hanus

