

Sofonnews

Hans van Lier Tyco Valves & Controls

Rick Lambrechts Tyco Valves & Controls

We enjoy getting
more done with
the same sales capacity

Business Case: Tyco Valves & Controls was looking for a way to improve their quotations both in terms of content and in terms of design. However, Sofon made a lot more possible.

Sofon Connected: Salesforce.com users can now simplify, speed-up and improve their quotation process thanks to the integration between Sofon and Salesforce.com.

Experts speak out: E. van Wijk Logistics wanted more insight into customer-specific price agreements and rates. This was realized with Sofon and price adjustments are now very smooth.



Price adjustments are very smooth with Sofon

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Standard software

Last December Sofon exhibited at *Dreamforce*, Salesforce's worldwide customer event. We met people from many diverse businesses, which had or were looking to implement quotation and configuration solutions with their Salesforce CRM package. Once again it has become clear to us that Sofon is probably the only supplier of a quotation and configuration package that actually supplies standard software. Whether they sell medical systems, machines or insurances, all our clients use 100% standard Sofon software. This means there is no customized software development necessary to produce product models. During our conversations at *Dreamforce* with users utilizing all kinds of quotation and configuration solutions, we noticed how special and unique our solution really is to the market.

Our vision for Sofon since its founding has always been to reduce the complexity of sales processes using standard software, implemented and managed by business users. We know that customized software can never be the answer to the complexity of sales processes. Your sales processes and your product portfolio are so dynamic that your customization is obsolete on the day it is delivered. You need something better: and in this edition of *Sofon News*, you will find the answers.

Otto van der Tang
Managing Director



Editors:

Marijn Schouten - Sofon
Judith Steinmeier - Sofon

Lay-out:

Grefo Prepress - Sint Oedenrode

Concept & Design:

credo.creatie - Eindhoven

Photography:

Hans van Asch, a.o.



Kees Op 't Hof

Marion Kant

Price adjustments are very smooth with Sofon

Rates and clear customer-specific agreements are crucial for E. van Wijk Logistics. The international provider of logistic services also required an effective use of their salesforce. Sofon was implemented in order to fulfill these requirements. Marion Kant (Sales Office) and Kees op 't Hof (System Management) explain the changes that Sofon had brought about.

What does E. van Wijk Logistics do?

Op 't Hof explains: "E. van Wijk Logistics is an international logistics service company with branches in the Netherlands, Romania, Moldavia and Ukraine. We have a suitable answer for every transport issue using the 285 trucks we have available. E. van Wijk is also a trustworthy partner for warehousing and other additional services. We stick to our agreements. That's very important to us."

What was the situation like before Sofon was used?

Kant explains: "We worked with various systems simultaneously that had no longer met our needs. We could only save information in a limited way and we could not produce reports. Our quotations and calculations were produced manually in Excel. This was time-consuming and prone to errors; it was for example easy to forget a change in rates. This is why we wanted to simplify the way the rates were put together. We also wanted more insight into client-specific rates and outstanding quotations."

What does E. van Wijk use Sofon for?

Kant continues: "We make use of the Sofon Sales Organizer (CRM package) and the Sofon Proposal Organizer (quotation generator). We use Sofon to produce quotations, including the accompanying calculations. Our price agreements with our various customers are now clearly defined. Sofon also greatly simplified our price adjustments."

How are prices put together in Sofon?

Op 't Hof continues: "We don't sell a product but a service. This is why cost and sales prices can be quite difficult to define.



For pricing we use a kind of price matrix per customer in Sofon, including loading and delivery locations, any client-specific surcharges, the units in which is transported...." Kant takes over: "The ratio of volume to weight is important to us. A truck can load 38 euro pallets, but it is not permitted to transport more than 25 tons internationally. This is taken care of in the matrix and Sofon keeps us extra alert to this."

What else has been achieved?

Kant explains: "Our quotations are uniform and have more of a recognizable image. We have also achieved time savings. We find that rate changes are very smooth. If a price increase of 3% has taken place, we would previously have to put the price up in Excel in every cell by hand. This is now automatic. An alternative quotation can now be quickly produced and we have a clear history of the quotations we have issued to date. Previously, it could be difficult to find the most current quotations." Op 't Hof continues: "Apart from that, we have various reports at our fingertips. We have insight into the (number of) visits a sales rep makes, the number of visit reports, issued and outstanding quotations and scored orders. In this way, we can measure the effectiveness of our sales reps far better and our sales reps can more simply follow-up outstanding quotations."

RESULTS

- Better insight into rates and customer-specific agreements
- Rates and price changes much easier to implement
- Effectivity of salesforce can be assessed better using reports
- Quotations no longer made manually
- Alternative quotation can be generated quickly
- Open quotations easier to follow up
- Clear quotation history

The fact that Sofon supplies standard software with no customizations sounded good to us

Case

Tyco enjoys getting more done with the same sales capacity

For this *Business Case* we talked to Hans van Lier (Strategic Account Director Oil and Gas) and Rick Lambrechts (Inside Sales Manager) of Tyco Valves & Controls' Dutch branch in Breda. This branch sells drives and circuit breakers – mainly from their own Tyco factory – in the Dutch market. Tyco

supplies a customer-specific construction of these products to industrial installers and industrial end users: factories in which steam, water and gas are processed or moved. Tyco was looking for a way to improve their quotations both in terms of content and of design; Tyco got in touch with Sofon...

Whole quotation and order process improved

Tyco was quick to discover that there was a lot more to improve than only the content and design of their quotations. Van Lier explains: "We found we could improve our whole quotation and order process with Sofon. Quotations would be rapidly and accurately produced and data would no longer need retyping manually in ERP when a request became an order."

Competitors

Tyco also gave Sofon's competitors a serious chance during the orientation phase. Van Lier explains: "But the Sofon software really offered more flexibility. And the people we came into contact with at Sofon clearly knew what they were talking about and listened closely to what we wanted. The fact that Sofon supplies standard software with no customizations sounded good to us. If we would work with a customized system, we would end up with different versions per country or per branch and we would be dependent on expensive, time-consuming programmers. We definitely didn't want that."

Sofon Day

Once the decision to go for Sofon was made, implementation started. Lambrechts continues: “Sofon gave us great guidance from a consultant with a lot of experience. He presented us with a detailed plan, worked out step by step, so it was clear which steps we needed to take to make our deadline. We formed a team of three product specialists, an IT person and myself. Tuesday was renamed as ‘Sofon Day’. On that day we could work exclusively on Sofon, without being disturbed. For us this was a good choice. The Sofon Day gave us speed and familiarity with the software. If an implementation is ad hoc, things will easily come up and slow the process down.”

Team

The teamwork brought Tyco many advantages. Lambrechts explains: “Every colleague has a different solution for the same problem and you choose the best idea from them. And if a colleague leaves the company, his or her knowledge is not all lost. That danger exists if you put only one person on the implementation.”

Clearing up

The biggest job the team encountered was clearing up data. Van Lier goes on: “Over the years mistakes tend to creep into your data. Other data turns out to be duplicated, and some data is even absent. With Sofon this kind of thing really gets sorted out. And that is definitely necessary to prevent mistakes in quotations and all the problems this causes.”

Implementation

After preparing for about half a year, Tyco is operational with Sofon. Quotation processing within the organization is now mainly automated. Lambrechts comments: “We now really see the advantages of Sofon on a day-to-day basis. Like most Sofon customers we now generate error-free quotations much faster. We have also seen our service improve. Previously, if an adjustment in a quotation was necessary, you could pretty much hear the sighs in the Sales Office. That was understandable, as the entire quotation would have to be re-calculated. Now Sofon does that automatically for us and it is a real pleasure to promise clients a new quotation within five minutes.”

Spare parts

Tyco now offers complete quotations that include optional spare parts. These spare parts were previously often not added. Van Lier continues: “Sofon automatically offers a ‘spare parts quotation’. This is very handy for the customer as spare parts are often needed; to us, this means that the value of our quotations increases.”

More work with the same sales capacity

By using Sofon, a lot of time has been freed-up. Van Lier: “We can get more work done with the same sales capacity. And that is necessary in these busy times. Because we work quickly, our quotation reaches the customer sooner.”

More possibilities

Tyco sees more and more possibilities to use Sofon. Lambrechts: “You never finish improving things with Sofon. There are so many possibilities. We can produce different sales documents with Sofon, include scale sketches in sales documents, and give our clients and service engineers access to Sofon... The options are limitless.”



RESULTS

- Quotations improved in terms of content and design
- Data is correct. Mistakes in quotations are prevented
- Impressive processing speed in generating quotations
- Standard software now in use
- Improved service: adjustments in quotations become much simpler
- Automatic offer of spare parts
- More work done with the same sales capacity

Salesforce.com users can now speed up, simplify and improve the quotation process



Marijn Schouten

Sofon Connected with Salesforce.com

In the Sofon Connected section, Sofon customers usually talk about the integration of Sofon software with other systems, such as CRM, ERP, CAD and

PDM. In this edition, Marijn Schouten – Director Business Development at Sofon – will tell us more about the CRM integration with Salesforce.com.

What was the reason to develop an integration between Sofon and Salesforce.com?

“With the Salesforce integration, Salesforce users can now get access to an *easy to implement* standard application for CPQ: Configuration, Pricing and Quoting. There is a great need for this kind of solution among Salesforce.com users – this became even clearer during the Salesforce event *Dreamforce '10* in San Francisco.”

What is the added value of Sofon to Salesforce.com?

“Organizations that supply products or services on the basis of customer-specific requirements, have to deal with complex sales scenarios. With Sofon Guided Selling, Salesforce.com users can easily and quickly create professional and error-free quotations and orders. This reduces sales costs and increases win rates.”

How does Sofon simplify, speed up and improve the quality of the quotation process?

“When making a customer-specific quotation, organizations often lose a great deal of time gathering the right information needed to produce a good quotation. Often only a few specialists hold the necessary knowledge needed to produce an accurate proposal, which demands substantial time and effort from them. Salesforce.com users can achieve a faster and error-free quotation process by implementing Sofon Guided Selling. Product and pricing experts can model their knowledge into Sofon where the information is made available for sales personnel and partners.”

Can you tell us more about the integration?

“For the integration between Salesforce and Sofon a Salesforce Connector has been developed. Sofon can be used independently but can also be launched from within a Salesforce

opportunity. The integration between Salesforce and Sofon has been realized for the Sofon desktop application (Proposal Organizer) and for the browser application (Web Sales Configurator).”

What is the process like when it originates in Salesforce.com?

“Once an opportunity has been created in Salesforce.com, Sofon can be launched from the opportunity and a new quotation is created. This quotation is automatically filled with the relevant information from Salesforce.com including customer and opportunity details. Quotation makers can quickly generate quotations, orders and contracts with specifications and conditions that meet their customers’ requirements and satisfy internal trade agreements, by simply answering a questionnaire.”

What happens when the quotation in Sofon has been completed?

“The Sofon quotation is stored as a Word or PDF attachment within the Salesforce.com opportunity and the quotation price, quotation date and other relevant information are added to the opportunity. Additionally, the complete quotation content is stored with the opportunity as a Sofon quotation object. This object can be used later on to modify or update

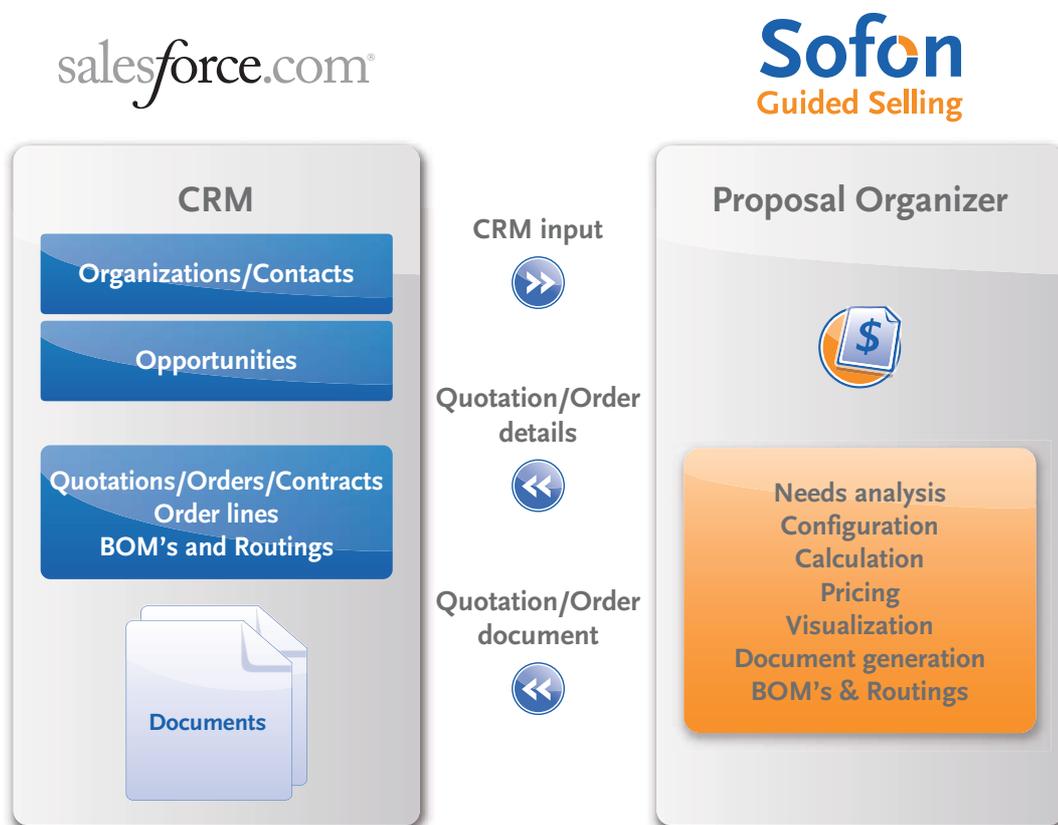
RESULTS

- Knowledge secured
- Simpler, faster and better quotation process
- Easy to implement
- Standard software with no customizations
- Reduction of sales costs
- Increasing of scoring rates
- Information exchange Sofon-Salesforce.com

the quotation. From an opportunity an existing quotation can be opened and an updated quotation can be stored as a new version. The opportunity is also updated with the newest quotation information again.”

Why should Salesforce users consider Sofon for Configuration, Pricing and Quoting?

“Sofon is probably the most powerful and easy to implement standard application for this purpose available for Salesforce.”



New customers

Sofon Guided Selling is used in various industries by – at first glance – totally different customers. Our customers operate in the world of industry, warehousing, transport, insurance, telecom and services.

A short introduction to a few new clients:



Agfa HealthCare, a member of the Agfa-Gevaert Group, is a leading provider of IT-enabled clinical workflow and diagnostic image management solutions, and state-of-the-art systems for capturing and processing images in hospitals and healthcare facilities. Agfa has locations in Europe, North America, South America, Asia and Oceania. Agfa HealthCare HQ is located in Antwerp (Belgium). Sofon has been selected as the new global quotation tool to support their sales, configuration, calculation and quotation processes. Sofon will be connected with Agfa's SAP ERP system.



Colt International provides a wide range of products and services for the built environment. Colt designs, installs and maintains systems for climate control, heating, natural ventilation, smoke control, solar shading and glass constructions.

Colt systems harness nature to provide healthy, comfortable and safe working conditions in industrial and commercial buildings around the world. Colt is present around the world through locally staffed companies. Sofon has been selected to support their sales, calculation and quotation processes.



ATAG Verwarming Nederland BV is a manufacturer and supplier of high quality heating equipment and solar energy systems. ATAG serves both consumer and business markets. ATAG products are sold in many European countries. Over 200 employees are committed to developing, manufacturing, servicing and selling the products. For a fast and error-free quotation process ATAG has opted for Sofon. Both dealers and corporate employees will now be able to easily configure products, calculate prices and generate quotation documents. Sofon will be used in combination with Salesforce CRM.



Hitmetal is the producer and supplier of welded wire mesh, temporary and permanent fencing systems, fasteners and metal products for manufacturing and trade. Hitmetal is characterized by a wide stock range, comprehensive logistics and services in the Netherlands, Belgium and Germany. In recent years, the organization has grown strongly. Hitmetal has ambitious goals for the coming years. To achieve these objectives, a fast and error-free quotation process is of the utter importance. Sofon supplies a proven solution to optimize the quotation process.



Sofon is the supplier of sales support software under the name Sofon Guided Selling. With Sofon, quotations, contracts, orders and other sales documents are put together simply, quickly and error-free. Among other things, Sofon Guided Selling supports calculation, configuration, visualization and document generation in any language desired. This decreases sales costs, reduces delivery times, increases the chances of winning business and improves cooperation between clients, dealers, sales, engineering and production. Sofon integrates with standard CRM and ERP systems and is suitable for all companies who have a client-specific way of operating – in every sector – anywhere in the world.

activities

Events

VKL Annual conference
3 March 2011
Mercure Hotel Zwolle,
Scania Zwolle (NL)
Never waste a good crisis

Contribution Sofon customer VMI

Sofon Seminar

31 March 2011
Maurick Castle in Vught (NL)
More orders with less effort

Guided Selling Blog

Sofon is happy to share knowledge with you! In Sofon's weekly blog posts, various experts from the Sofon organization speak out. These experts have a clear insight and experience into best practices within the sales and quotation processes of companies who supply client-specific products and services.

You can share in this knowledge by visiting www.sofon.com/blog.

Twitter

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I www.sofon.com
E info@sofon.com