EUROPEAN
RENTAL
ASSOCIATION

ERA GUIDE

Choosing and Implementing a CRM system

WELCOME

EUROPEAN RENTAL ASSOCIATION

from ERA Future Group

Rental companies are in the solutions business; our objective is to provide the perfect machine or equipment for every task. In an increasingly competitive environment, one key differentiator can be your superior customer service.

Customer Relationship Management (CRM) software has the power to help you enhance customer service, while also improving the productivity of your sales force and marketing team. In theory it sounds really great – but only if you get the right CRM for your business. This is not just a technical issue in terms of finding a provider that can integrate with your Enterprise Resource Planning (ERP) software; it is vitally important that the CRM is tailored to meet the specific needs of a rental company, as well as your unique business objectives. Remember: one size does not fit all.

This guide is intended as a guide to help you ask the right questions of CRM vendors, to ensure that you purchase the best possible system for your company. We examine the four key stages: Discovery; pre-implementation; implementation; and post-implementation.

We explain why CRM is important, and analyse why it is vital to choose a CRM solution that is designed specifically for rental companies. Furthermore, we examine the different applications for CRM, for both sales and marketing.

This guide also highlights best practice, by featuring case studies from leading rental companies who give their unique insights into procuring, deploying and optimising a CRM solution. On behalf of the ERA, I extend our thanks and gratitude to the members who gave their time to be interviewed for these case studies.

We are publishing the guide in English, but we recognise that English is not the first language for many of our members. For this reason, the book features infographics, Key Points and summaries, to present the information clearly, concisely, and in a format that is easy to read and understand.

The equipment rental industry exists in a rapidly changing world, where technology is evolving all the time. For this reason, we will update the guide as required. Therefore, we would welcome feedback from all members and examples of your own experiences with CRM. Please send your comments to the ERA team, at era@erarental.org.

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THE BIG QUESTION

The first question to address is also the big question:

Why is it important for rental companies to have a CRM system?

OVERVIEW

CRM stands for Customer Relationship Management. In essence, a good CRM system can deliver the following benefits:

ENHANCED MARKETING CAPABILITIES

- Plan and execute digital marketing campaigns.

BETTER MONITORING OF SALES TEAM ACTIVITY

- Data on individual performance of each sales team member.

BETTER PRODUCTIVITY OF THE SALES TEAM

- A paperless system that your sales personnel can access from anywhere
- Understanding how a sales person calculated a price for a customer can be of value to the rest of the sales team when dealing with the same customer
- Helps your sales team be proactive, such as reminding customers that the period when your price quotation is valid is coming to an end

BETTER VISIBILITY OF SALES PIPELINE

- More accurate sales forecasting based on sales team activity.

BETTER UNDERSTANDING OF CUSTOMER ACTIVITY

- Understand not only what your customer is renting from you, but also what your customer is not renting from you
- Credit checks can help minimise the risk of non-payment from customers in financial distress.

STRONGER LEAD GENERATION

- Identify and target potential customers to generate new business opportunities

CRM is important for rental companies because it can help you refine your sales and marketing techniques, in what is an increasingly competitive market place. CRM for rental is very different from other sectors. For example, a rental company's pricing model is far more complex than that of a construction equipment distributor.

The ERA Future Group has compiled a comprehensive list of the key requirements for a CRM system. After reading this guide, we recommend that you download the "CRM - Key Requirements" document from the ERA website: **erarental.org/en/publications/position-papers-and-guidance-to-industry/crm-key-requirements**.
We advise you to read it and select 5 KPIs from the list. This will help you to implement a CRM in the most cost-effective and efficient manner.

KEY CRITERIA

The ERA Future Group identified the following priorities to help you select a CRM that is fit for purpose for equipment rental. The CRM must therefore have the following specific attributes in order to be effective:

1. **Be able to manage the complexities of pricing in the equipment rental sector**
   CRMs are typically based on selling goods, not equipment rental. Your CRM needs to give you the ability to calculate more complex pricing based on units and duration of rental. It should also take into account the seasonal nature of equipment rental.
2. **Be capable of full integration with third party systems**
   Your CRM needs to be able to easily access information from other systems, like construction project data from sources like Glenigan in the UK or Infobau in Germany, and also from your ERP system. While no system can be guaranteed as future-proof, your CRM should have the flexibility to adapt to new communications channels, such as social media.
3. **Be able to understand that every customer can be the customer of several branches of your rental company**
   Many CRM systems are configured so that each account can only have one "owner". Rental CRM needs to be able to cope with the fact that a customer can do business with many different rental stores within your company.
4. **Be able to drill down to the end-user level**
   In many cases, with equipment rental, the primary contact for the CRM is the end user of the equipment, not a purchaser or manager.
5. **Have the capability to record the decision-making level of each individual in your contacts database**
   For example, does the individual a decision-maker for making a purchase? Or are they a "gatekeeper" like a personal assistant, who acts as a filter for communications to a decision-maker such as a director or owner of a company?
6. **Enable you to change the company details of a contact**
   People move from one company to another more frequently these days. If your contact moves from Company A to Company B, a good CRM system will enable you to amend the relevant fields without having to delete the account and re-enter all the information. Furthermore, you need to be able to easily update your CRM if a customer makes acquisitions, sells parts of their company, or merges with another customer.
7. **Be able to manage cross-renting to other rental companies**
   Cross-renting equipment to other rental companies is an integral part of the rental industry. Your CRM system must be able to understand this process.
8. **Be multi-currency**
   This is vital for multinational rental companies, national rental companies with future plans to enter new markets, and even smaller rental companies which have customers working on both sides of a national border.
9. **Be multilingual**
   Many countries have more than one official language. Furthermore, multinationals need all their field personnel to be able to use the CRM system, in their native language.
10. **Manage different tax rules**
    Again, this is an important criterion for multi-national companies. Of course, an ERP system will manage the tax rules of different geographical markets. But the CRM needs to be linked to this information in order to accurately produce quotations and invoices.

THE ROUTE TO SUCCESS

There are 4 key phases that form part of the successful investment and deployment of a CRM system. Here we advise you on how to create the right plan – and stick to it.

The 4 phases of CRM are: Investigation; Pre-Implementation; Implementation; and Post-Implementation.

1. Investigation

This falls into two parts. The first part is an internal interrogation – the management team needs to ask the right questions, which should include:

- Articulating your company's goals and objectives – what you expect from CRM
- Identifying the amount of money you are prepared to invest in CRM
- Identify which systems the CRM must integrate with, such as ERP

The second part is an external exploration. This should include:

- Finding out which CRM systems your closest competitors use
- Meeting with CRM providers to discuss their capabilities
- Ensuring that the CRM system is fit for purpose – see page 3 for more details
- Choosing a single supplier, or integrating modules from various providers

At the end of this process, you might even decide to build your own CRM system, instead of buying one from an established provider. For an example of a self-built system, see the Gomez Oviedo case study on page 8.

2. Pre-Implementation

This is the planning process to create your road map to implementation. This could include:

- Defining the KPIs that you want your CRM to measure, along with the reporting system
- Hiring a development team, if you are building your own system
- Planning and testing any integration that is required
- Fine-tuning your requirements with your CRM provider(s)
- Negotiating all pricing on future modules – this can save you money in the long run
- Finalise your training plans – either create an in-house team or buy in training
- Internal communications to optimise "buy-in" from your colleagues

3. Implementation

This is the most important period, but it should be straightforward, providing you followed steps 1 and 2. It is all about the roll-out process:

- Start on a small scale, ideally with a single geographical area
- Flag up any technical issues with implementation and address them
- Seek feedback from employees and make any changes required
- Roll out the improved version to the next geographical area

4. Post-Implementation

This final phase is all about analysis and fine-tuning:

- Measure the CRM system's performance against your objectives
- Communicate regularly with employees and gather their feedback
- Identify any gaps in service provision – is the CRM system missing something?
- Invest in additional modules or develop new features as required
- Update system to keep up to speed with third party technology

INVESTIGATION

INTERNAL INVESTIGATION

- Decide on what you want from a CRM system
- Agree on the budget for a CRM system
- Identify requirements for 3rd party software integration

EXTERNAL EXPLORATION

- find out which CRM systems competitors use
- make sure any potential system is fit for purpose
- choose a single supplier, or integrate modules from different

PRE-IMPLEMENTATION

- Hire a development team, if building your own CRM
- Plan and test integration with 3rd party systems
- Fine-tune your requirements with your CRM provider(s)
- Negotiate all pricing on future modules
- Finalise your employee training plans
- Plan your internal communications strategy

IMPLEMENTATION

- Start with a single geographical area
- Flag up any issues with implementation
- Seek feedback from employees
- Roll out to the next geographical area

POST-IMPLEMENTATION

- Measure CRM performance against your KPIs
- Communicate regularly with employees
- Identify any gaps in service provision
- Invest in extra modules or develop new features
- Update the system as required

EXPERT ADVICE

ASKING THE RIGHT QUESTIONS

Asif Latief, Marketing Director at A-Plant, highlights some of the areas to consider when choosing a CRM solution.

1. Should you buy an existing CRM system or develop your own?

Firstly, before you even consider developing your own system, find out if you have the in-house knowledge and capability to do so. Don't just ask your IT team if it can build a CRM! You also need to define your KPIs, by engaging with stakeholders all relevant parts of your business. Working with a CRM consultant can help with this process.

Secondly, compare the time and costs of implementing an existing CRM system to those of building your own solution. You might initially find that developing a CRM in-house is more cost-effective for you, however once you taken into account the maintenance over a period of time it may work out significantly more expensive. This is especially true if you are in a multi-site or multi-user environment.

Thirdly, think about what features you want from your CRM. Building your own solution from the ground up means it will be completely focused on your KPIs. If you purchase an existing system, you might have to change your internal processes to fit the CRM, rather than vice versa. There are very few systems that can be used for the rental industry that could be used without significant development.

2. What should a CRM system include?

At the very least, a good CRM system should allow you to store customer and prospect data, and allow you to record actions and campaigns against that data. The aim is to help you to grow your current customers and acquire new ones.

Beyond this it's about choosing the best way for the system to interact with the people who will be using it. Questions to consider are:

- Will it need to work offline?
- Which reports are required and by who?
- Can the system be integrated with external data sources such as Glenigan?
- Will the system be hosted on a local server or cloud-based?
- Do you already have a PoS system that needs to interact with the CRM system?
- Can the system be tailored further to allow it to grow as your company grows?
- What kind of training is required? Will it need a dedicated resource to manage this?
- What is the cost of each license?
- Is there a data limit per user?
- Can you record multiple contacts and sites per company?

EXPERT ADVICE

ASKING THE RIGHT QUESTIONS

3. What benefits should we expect from a CRM system?

There are different priorities and benefits for different stakeholders

Sales Team: You should be able to access the information on customers, contacts, products hired and bought, spending patterns and have the ability to see what contact others have had with them. In addition, you should be able to see what stage a job site is at (planning, shovel in the ground, fit-out, etc.) and access a summary report that would give you a snapshot of the customer before you go and see them.

Sales Manager: In addition to the above, you might also want to see a combined view of all sales activity, understand how many calls are being made, and record the success rate. This enables you to analyse the effectiveness of your sales force.

Senior Business Managers: You might want to see where your customers are, where you should open new premises, and other patterns or trends.

Marketing – You need the ability to set-up marketing campaigns and record their effectiveness to demonstrate ROI. However, the system should keep you compliant with legislation such as GDPR. For example, you can log individual customer preferences on whether they prefer to be contacted by email or telephone. Sometimes it is not just about the cost of investing in a CRM, it is about avoiding hidden costs such as fines for breaching data protection laws.

4. How do we ensure that our colleagues embrace CRM and make the best use of it?

With any kind of change there are supporters, opposers, and neutrals. Make sure you get full buy-in from everyone who will be using the CRM. Help people understand that CRM can enable them to be more productive, exceed their targets and achieve higher success rates in their roles which may equate higher bonuses. Use incentives – the carrot is better than the stick.

Do not underestimate the time needed on user adoption - as the best system in the world is worthless if no one is using it.

CASE STUDY

GOMEZ OVIEDO

BUILD YOUR OWN ADVENTURE

Gomez Oviedo is proving that CRM can really benefit independent rental companies as well as national and multi-national corporations. And you don't have to buy an existing system – you can even build your own! Nicanor Piñole Álvarez, Madrid Area and Digital Marketing Manager, explains how it can be done.

Gomez Oviedo is an independent rental company founded in 1947 in Oviedo, in the Asturias region of northern Spain. The same family has owned and run the business for three generations. The company combines a proud heritage with a very forward-looking mentality. In fact, Gomez Oviedo won Small Rental Company of the Year at the European Rental Awards 2017. The judging panel said that Gomez Oviedo was "a small company that acts like a big one" – and this is true of its approach to CRM.

The company has a long history of successfully working collaboratively with other independent rental businesses in Spain. Nicanor Piñole Álvarez, Madrid Area and Digital Marketing Manager for Gomez Oviedo, outlines the strategy.

"We developed an ERP a solution with some other rental companies several years ago, and this proved to be a very successful model," he said. "We created some software that other companies can buy for a small amount and we all get the benefit. The software development company is a separate entity and it only develops the software for this select group of rental companies."

The open-source system used by the group is called Smart Software Solutions (www.smartastur.es). "We used it to develop our own CRM, with the same group of rental companies as for the ERP system" added Nicanor.

This seems like a bold step, but in reality creating your own CRM is not technically complex operation. "CRM is a fairly basic tool from the point of view of computer science" said Nicanor. "There are lots of affordable, capable developers out there, who can develop whatever CRM system you want."

Gomez Oviedo decided to develop its own CRM for several reasons. "We are an SME so we needed more flexibility than most of the established CRM solutions offered" said Nicanor. "For our company it would actually be more expensive to adapt an existing solution to our company, than to develop our own."

The most important step is the planning stage, where Nicanor says it is vital to be realistic about what you want out of a CRM system. "If you decide you want to know everything, you will end up with a really complicated system. Also it will take your sales people a long time to gather all of the data and type it into the CRM in the first place. In a bigger company you can have extra people to do the typing, but in our business we need the sales team to still be working on their day jobs, with their clients."

Key Points

- Building your own CRM gives you complete control over the system's capabilities
- Working in partnership with other rental companies can make it very cost-effective
- Keep it simple! Don't overcomplicate the software, or no one will use it

Photo credit: International Rental News

CASE STUDY

KEEP YOUR FOCUS

If you are developing your own CRM, it is vital that you remain focused on your key priorities. Identify what functions your CRM needs and what role it will play in your operations.

"You cannot measure everything because you will end making a complicated system that people won't use" said Nicanor. "You have to carefully plan what you want to get from the program. Decide on what information you want, how you can get it from the customer or potential clients, and how you want to be able to access or interrogate that information.

"We decided to focus on the headline data: what machines do they use? Where are their construction sites? If they are not your client, who do they work with? Typically, all of this information is in your ERP, but you cannot quickly analyse it or interrogate it without CRM.

"On the one hand we wanted more access to historic data on our clients, such as the type of machines they rent from us, their turnover, and the correct contact persons. On the other hand, we knew that we had a lot of information about companies that were not currently clients and we wanted to know why we didn't work with them. Was it about price, or relationship, or product offering from competitors?

"With the CRM, it became easier for us to develop relationships with new clients. It also helped us to understand our clients better. We want to enhance our customer experience, so we use CRM to tell us what our customers want - then we give it to them. We also use CRM for marketing. For example, we already produced a newsletter and did some direct marketing to our regular clients. Now with the CRM we can use it for those companies that are not yet our clients."

Gomez Oviedo has 4 depots in Spain, as well as 3 in Panama. They tested the new CRM in Oviedo and made some changes, before rolling it out. "We changed it to simplify the system before we rolled it out" said Nicanor.

"Getting employees to embrace a big change like CRM can also be more difficult for smaller companies. Some people can think it is a tool for controlling them, rather than helping them to do their job more efficiently. But once they see that another person in the team or in another region gets some information that is useful for them, it makes them believe in it more."

Overall, the 'build your own' approach has been very successful for Gomez Oviedo.

"The requirements of a CRM will vary depending on the size and focus of the company – there is not a right or wrong answer. In bigger companies the structure is more defined so it is easier for them to adapt to have a more standard solution. In our eyes, for smaller companies it has to tailor-made."

Key Points

- A tailor-made CRM will be focused on your specific KPIs, accurately reflecting your needs
- Build flexibility into your CRM system
- If you build your own CRM, you will have to manage the project very carefully

CASE STUDY

SEVERAL SYSTEMS IN ONE

CRM software is actually several systems rolled into one. Pierre-Yves Rallet, VP Sales and Marketing for Loxam, offers his advice on how to invest in a CRM system in the most efficient and economical way.

Loxam has used its CRM for over 5 years, starting in its homeland of France before deploying the system into other countries. The company also rolls out the CRM to any companies that it acquires.

"Our CRM is closely linked to our ERP system" said Pierre-Yves. "From the CRM, we import information from external bodies that supply us with financial information about the customers, such as credit scores. Data - such as offers, contracts, and customer revenue - feeds in from the ERP to the CRM..."

In seeking a CRM supplier, the key objectives for Loxam were to gain a better knowledge of its customers, and to gain better insight into the performance of its sales team. There was also some customisation required to enable the CRM system to meet the criteria of a multi-national rental company.

"Pricing is very specific in rental" said Pierre-Yves. "You don't know for how long the equipment will be rented, or the exact cost of the fuel. Most CRM systems rely on the fact that you have a sales lead, you make a visit, you make a quotation through the CRM, or Quotation module of it, and then you have a contract. The rental business requires that you can make quotes very rapidly, though pricing items can be complex. Therefore it is not easy to make directly an offer from the CRM.

"At first it was very difficult to replicate the sophistication of some of our pricing with the CRM system. So we have to make the interface ourselves, and getting it right was the tricky part."

The foundation of a successful deployment for Loxam is training and communication. "It requires a lot of training" said Pierre-Yves. "We have our own internal training team dedicated to the support of the CRM system. They train the trainers in each of the countries and we find this to be a very successful model for us.

"In the beginning, when we rolled out in France, we had sponsors and trainers in each of the regions, and they really helped us. We have all of this expertise in our own company, which is very important. For example, our own people understand exactly how we have customised the system. Therefore, the people who do the training know about those specific details. On the other hand, an external body tends to carry out training only based on the original framework, which can be different to what you are actually using.

"With regards to communication, we use Chatter, which is the social network and is a standard feature on our CRM. Our people really like to use that, which has helped a great deal in terms of buy-in.

"We have reached our objectives. We have a better view of the sales force efficiency and of our business. In terms of monitoring we are very efficient, and we have minimised the risk of not getting paid."

CASE STUDY

LOXAM

LONG-TERM PLANNING CAN SAVE YOU MONEY

Long-term planning can help rental companies minimise additional costs further down the line, as they seek to add new modules or features to their CRM systems.

Investing in a detailed implementation plan at the beginning can help you avoid paying higher fees for new modules as your business grows. "My advice is that it is better to negotiate everything from the start, because it is much easier and more affordable that way" said Pierre-Yves.

"Once you have signed up for a CRM, the provider's goal is to upsell, which usually means additional users or extra features. If you have not negotiated the prices of these extra modules already, it is difficult to get the supplier to be flexible on the pricing, because they know they have already got you! Negotiate pricing on all modules that you might be interested in, before you commit.

"CRM is in fact several systems in one, so it is important that you clarify what you want in the beginning. Smaller rental companies might want to clarify the size of each customer, and how often they visit, the value of their last order. But at the other end of the scale you can have a much more sophisticated system.

"It is important that you know where you want to go. It is only for the sales team, or for improving your marketing? Decide beforehand, what do you want to measure? On top of having a view on customers' activities, it might be a specific focus on visits or number of offers; or you might want to look at the turnover made by each sales person, or more in-depth analysis of how much each sales rep is bringing to the company. One of the strengths of our CRM system is its reporting capability. This enables you to analyse the data - but you still need someone to manage and understand all that data."

Attempting to integrate third party software with CRM systems can also come with additional costs. "Be aware that a lot of companies claim that they have software that interacts with CRM" said Pierre-Yves. "You almost always will find that there are integration costs on top of the list price."

The biggest challenge for Loxam was getting employee buy-in to the system. "The way your managers use the system will determine how successful it is" said Pierre-Yves. "Otherwise you have a nice system with no information in it.

"If the sales team don't find it beneficial for them, they won't enter the information in the system. You have to motivate them. Explain how they will have better planning and a better view of their accounts, so they understand how they will really benefit."

Key Points

- Have a very clear, long-term plan from the outset
- Ask yourself the important questions about what benefits or outcomes you expect from a CRM system
- Negotiate pricing on future modules as part of your initial deal. This should save you money in the long run
- Invest in training to make sure you optimise the return on investment from a CRM system
- Demonstrate the benefits to your sales team, to make sure they are incentivised to use it properly

CASE STUDY

CHANGING YOUR CRM

Kiloutou started out with a self-built CRM system, but has decided to replace it with a popular alternative. Valérie Marchand, Sales and Marketing Director, explains how the switch will support Kiloutou's strategy to place the customer at the heart of its business.

Kiloutou created its own CRM, which launched in 2011. Initially the system was only for the company's sales representatives. "We wanted to manage the activity of sales reps such as meetings with customers, analyse data and have some reporting functionality" said Valérie Marchand, Sales and Marketing Director for Kiloutou. "This system also enabled us to create new contacts and manage new construction projects."

The company added mobility to its CRM in 2013, providing all of its field sales personnel with tablets so that they could access the system while visiting customers. "Being able to access the customer tariff and view real-time availability of products, as well as construction project data was a real benefit to our sales team" said Valérie.

In 2017, Kiloutou decided to invest in a new CRM system from an established supplier. "Our objective is to put the customer at the centre of our business and to have a complete view of all the interaction that the customer has with our company" said Valérie. "For example, if the customer has a discussion with someone in one of our branches, and at the same time is requesting a meeting or an invoice, we can store and view all this information in one place.

"Our main focus for 2018 is to increase personalisation, in order to further improve the customer experience when you work with Kiloutou. CRM is a great tool to help us manage and achieve that objective."

Kiloutou has chosen a CRM system from a leading provider. "Our provider is the market leader and that is why we chose them. They have a good track record of listening to their customers and of continuous improvement - each year they implement 3 improvements based on customer feedback."

The first phase will involve deployment in one region of France, enabling Kiloutou to tweak the system and address any issues before rolling it out. The company will use middleware to initially create a hybrid system of the old and new CRM, before moving completely to the new system. "This move presents a great opportunity for us to clean the data that we have in the current CRM before importing it into our new one" said Valérie.

"At the end of January 2018 we will finish the conception with a stage of our CRM and have a pilot for 3 months with one region. We can manage changes and identify issues in order to improve the system for our sales reps and our team. A full region enables us to test all interaction across all departments of our company. Once we are happy with the solution, we will deploy in the other regions one at a time. We want to properly communicate with our people and to train them, so it will take time."

CASE STUDY

MANAGING THE CHANGE

Kiloutou has 4,500 employees across more than 480 outlets in France, Poland, Spain, Germany, and Italy, along with more than 1,000 line items in its rental stores. Managing the change to a new CRM system is vital to its success.

The company invested a considerable amount of time in the planning phase, ensuring that it had a clear vision of what it wanted from the CRM. "We had a team working on what we want to have in the system; they met every week" said Valérie. "You need to be clear on your strategy – what do you want to improve in your company? What are your key challenges? How all the solutions help you to manage your main challenges?"

Kiloutou's self-built CRM was designed solely for use by its sales team. But it will deploy the new CRM across all of its rental depots as well as for the sales reps. Its goal is to achieve full deployment by the end of 2018. "Asking employees to change their habits is always challenging" said Valérie. "However, we are confident that our employees will embrace the new CRM, as we can clearly demonstrate to them that it will benefit their working lives."

Winner of the Employer Innovation Award at the European Rental Awards 2017, Kiloutou has a demonstrable track record on employee engagement. So it is no surprise that the company is providing a high level of support to workers as it prepares to roll out the new CRM.

"At first the supplier will train key users for us" said Valérie. "They will be our in-house experts – people who have a really solid understanding of the system. The supplier will help with training in each region as we roll out; but our key users will deliver a lot of it"

Communicating the benefits of the CRM – and its importance to Kiloutou's customer-focused strategy – is also a vital ingredient for a successful roll-out. "Our main concern is to explain why the CRM is critical to implementing our new strategy of putting our customer at the heart of our organisation. First we must explain the 'why' behind the strategy; the benefit to the customer, to the employee and to the company.

"I am confident that we have chosen a good solution. Making sure that the employees use the solution properly is our next main challenge. We will put a lot of energy into this part of the process. You can have the best solution in the world, but if your employees don't use it correctly, you won't maximise the benefits."

Key Points

- Don't be afraid to change your CRM system as your business grows
- Form a working group to identify what you want from your new CRM
- Invest in training for a team of in-house experts who can support the wider user base
- Switching CRM provides a great opportunity to clean the data you have in your system
- Communication is the key to achieving high levels of employee engagement

CASE STUDY

CRM SUPPORTS INTERNATIONAL GROWTH

Boels is one of Europe's fastest-growing equipment rental companies. During its rapid expansion into new geographical territories, the company recognised that it needed a better CRM system to support its evolving business. Edwin Wijers, Director of IT & Operational Excellence for Boels, discusses the implementation of its CRM.

Boels already had some CRM capabilities during the 2000s, but the company began to feel that it had outgrown the system. In 2011 it began looking at options for a more comprehensive CRM solution.

"We were rapidly expanding in two ways at this time" said Edwin Wijers, Director of IT & Operational Support at Boels.

"Firstly, we were adding to the portfolio of equipment that we offered our customers; our assortment was growing very quickly. You have a totally different way of dealing renting a drill, compared to renting an excavator. So we needed a CRM system to reflect the growing diversity in our product offering.

"Secondly, we were establishing Boels in more countries. Speaking different languages therefore becomes a challenge for CRM. We speak 8 or 9 languages in the eastern or southern European countries – and there is not the same second language capability in these regions as we find in northern or western Europe."

Boels' primary aims with CRM were to improve its level of knowledge about its customers, and to improve customer communications. The company also wanted to support the field sales team and monitor the activity of its sales personnel.

"The mobile nature of our sales force created its own challenge" said Edwin. "Fundamentally, we needed the CRM system to be accessible from all handheld devices and from all countries – in this way, we could use the same system everywhere, and we were not dependent on the customers' IT infrastructure.

"CRM should make the job easier for the sales reps, not just be about measuring their activity. The goal is to get a more complete customer picture so that you have a better understanding of what the customer wants."

Boels issued request for information to various CRM suppliers, in order to check the capabilities offered by each company. In 2012 it appointed a CRM provider, with a view to carrying out an extensive trial in Boels' home territory, the Benelux region.

"One of the positive factors was some of our competitors already used this supplier" said Edwin. "If others are using it in your field, you have more confidence that it will be suitable for you.

"We start every deployment in the Benelux area. We find that this is the best way to achieve common practice across the company. The size and scale of our organisation is very different by country - within the Boels group we are the most advanced here in the Netherlands. The people who support the implementation process also live in the Netherlands, so that makes it easier than starting the deployment in Poland, for example."

CASE STUDY

INTERNATIONAL DEPLOYMENT

Boels began with a focus group, and then implemented the CRM in a few parts of Holland and Belgium. After this proved successful, it deployed the CRM system across the entire Benelux region. There was another pause while the team analysed and checked that everything was OK, and then Boels began the roll-out to other countries.

"The sales team was more positive about it than I thought it would be when we started" said Edwin. "I thought there would be more reluctance, because they would view it as losing their freedom. But in practice, they saw the benefits very clearly. The few who were reluctant to use it were those who were generally reluctant to use IT, not specifically the CRM.

"We didn't have to make many changes as we rolled it out, because in Italy a Boels employee is working in almost exactly the same way as a colleague in the Benelux. The only thing that we had to differently at each stage was to thoroughly check the language capabilities for the relevant countries."

However, this was not a completely 'plug n play solution' as Boels required the system to integrate with other software systems.

"We are using rental software in a totally different way to most of our competitors" said Edwin. "The functionality of our CRM is comparable in other companies, but the way it connects to our ERP and financial systems is unique to Boels. However, it is a very open system and there are a lot of interfaces available, so it was more about fine-tuning and developing than deep integration.

"We hold the information in the ERP and import it to our CRM as it is needed. So we can see exactly what the customer has on rent or the business we have done over the past few years with that customer. In this way, the sales rep can see everything."

The company updated its CRM system in late 2017. "The update is really about refining details, as things become available that were not available before" said Edwin. "It is not a revolution, more a series of small improvements. For example, we refined the way it records long-term agreements and how it connects to our other systems. It is now even more automated, making it easier to import data back into the ERP system."

The system has brought significant operational benefits to Boels. "It has improved the knowledge we have about our customers" said Edwin. "With CRM we have a better insight into current accounts and prospects. It has improved our leads management processes - by funnelling these possibilities we have a better knowledge of what to expect in the near future.

"Analysing the activity of our sales reps is really an added bonus – for us, the CRM is more focused on improving our knowledge about the customer."

Key Points

- Find out which CRM systems your competitors use – if it works for them, it will most likely work for you
- Take the time to investigate the capabilities of the CRM system before you invest – make sure it has the features you need, such as multi-lingual capabilities
- Ensure that any prospective CRM supplier can integrate their system with your other software, as required
- Test the CRM in a small geographical area before attempting a wider roll-out

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