Swagelok Stuttgart Merges Sales & Support with Vision33's Saltbox Integration Platform

Saltbox

Industrial systems supplier rapidly integrates SAP Business One, Salesforce, and Zendesk

Vision33

ABOUT

Swagelok Stuttgart is the authorized Swagelok® sales and service center for the Baden-Württemberg region of Germany and parts of Rhineland-Palatinate. From high-quality fluid system components to fully assembled systems, as well as additional training and service offerings, Swagelok Stuttgart provides everything an organization needs for the successful and safe operation of a fluid system.
Visit them on the web at www.stuttgart.swagelok.solutions.

The need to rapidly integrate SAP Business One ERP and Salesforce CRM

In 2019, the operations team of Swagelok Stuttgart launched a major initiative to make the company as agile as possible. The plan focused on implementing best-of-breed, cloud-based enterprise systems that would enable all employees to work effectively, regardless of their location.

As the core components of the team's initiative, they implemented Salesforce CRM, SAP Business One ERP and Zendesk (customer quoting and support) – all in the cloud. "The goal was to have great applications in the cloud that would make us agile for selling to, and servicing, our customers," said Ekard Messmer, Director of Operations at Swagelok Stuttgart. "We wanted an empty server room and all cloud-based apps so that people could work at home, in the office, or anywhere else on any given day."

By March of 2020, the team's vision was nearly completed. There remained just one major obstacle: Swagelok Stuttgart's sales team performed all their tasks and information gathering within Salesforce, while the operations team used mostly SAP Business One. This made it difficult for sales professionals to see what was happening within each of their customer accounts – especially when they were on the road. "We had to create a query function to help sales people see which new quotes were recent and which required follow-up. It was a lot of manual steps and slowed down the team," said Nina Tsuji, Sales Development Manager at Swagelok Stuttgart.

Immediately, the operations team began searching for a way to gain a seamless and robust integration between SAP Business One and Salesforce CRM. The specific functional capability they needed involved matching customer data and context with quotes. Doing so would make the quotes far more responsive to customer needs and lead to both higher sales rates and shortened sales cycles.

The Saltbox integration platform saves the day

After performing diligent research, Swagelok had not found a product or focused solution designed to integrate SAP Business One with Salesforce. "It became discouraging," said Tsuji. "It looked like we were going to have to put our whole sales team on SAP and then use the CRM within SAP. Even that would not have given us enough capabilities."

One of the operations team members made a last-chance effort to identify a potential solution by contacting Vision33, the largest partner for SAP Business One. As it turned out, Vision33 had identified the same integration issue with Salesforce (and other SAP B1 integration opportunities), and as a result, had recently released an innovative solution – the Saltbox integration platform. Saltbox operates as a service and includes a pre-built SAP B1-Salesforce integration. "We were elated to find that we could use Saltbox to integrate Business One and Salesforce. It meant that we could keep our best-of-breed apps without having to buy more ERP licenses," said Messmer.

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Saltbox enables a holistic Sales & Support system

Since the Saltbox platform is an iPaaS (implementation platform as a service), Swagelok Stuttgart integrated SAP Business One with Salesforce rapidly. Now, all context surrounding customer accounts (resident in Business One) appear within Salesforce for easy viewing by the sales team. When any customer information changes in Business One, the changes also show up in Salesforce in real time.

"I can tell you, once we had the integration between SAP Business One and Salesforce, it took just one week to have everyone working from home," said Messmer. "Almost no one, except the warehouse and assembly folks, worked in the office." The 30 employees who suddenly worked remotely remained highly effective and productive throughout 2020, supporting customers without delay.

The SAP B1-Salesforce integration works so well that the operations team began planning to next integrate SAP B1 and Zendesk. Swagelok Stuttgart uses Zendesk to manage customer complaints and support as well as perform all their order and quoting management. However, the Saltbox integration to Salesforce made the additional integration unnecessary. That's because the Saltbox integration allows a full spectrum of data to flow into Salesforce.

With a Salesforce-Zendesk integration already in place, full customer context started flowing from SAP B1, into Salesforce, and straight into Zendesk. That streamlines both quoting and customer support. "Now, we're able to automate the follow-up for quotes via task triggers as quotes come in," explained Tsuji. "Any customer issues get noted in Salesforce, then onto Zendesk they go, where we can work on them and assign them tickets."

In the end, the Saltbox integration for SAP B1 and Salesforce provides Swagelok Stuttgart with an entire system for sales and support. The operations team particularly likes having access to all the requests in the system. "We go to the Zendesk environment and say, 'Okay, show me the whole company', and we quickly see how many tickets and what problems have occurred, and are occurring, based on information from everyone involved."

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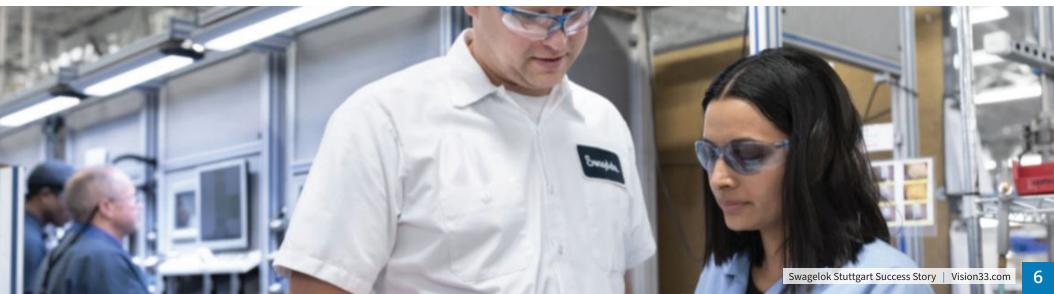
Future plans:
to add a revenue stream via Saltbox

Swagelok Stuttgart is currently trialing a new learning management system which the team plans to integrate with Salesforce. This system will underpin the revenue stream around external training, offered as virtual training sessions. "Saltbox makes it possible for us to build an academy for our customers that is accessible through the learning management system, with an online shop for ordering the training," explained Messmer. The integration in Saltbox will bring in payment functionality and give customers direct access to the learning environment, including the company's knowledge base.

"We're always on the lookout for new systems or new ways to do things. We might add new apps or even change quoting systems if we find a better fit than Zendesk. The point is: Saltbox makes it easy to switch systems and know that a new design will always work," said Messmer.

Vision33 (www.vision33.com) helps growing companies deliver on the promise of technology through enterprise resource planning (ERP) solutions, including SAP Business One and Sage Intacct, automation, and integration solutions. Vision33 has the people, processes, and technology to help businesses solve everyday challenges and seize new opportunities for growth and transformation. With proprietary solutions such as iDocuments and Saltbox, Vision33 helps businesses leverage the right transformative technology for their digital transformation journeys.

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