

case study: Siemens

background

The Automation and Drives Division of Siemens Canada is dedicated to providing complete electrical engineering and automation solutions, along with the right products, software, and services to their clients nationwide. Their customers include some of the world's largest and most respected companies in the industrial, manufacturing and construction industries, retailers, and leaders in the e-business sector. Backed by Siemens Energy & Automation and with research & development expenditures in excess of \$32 million per year, the professionals in the Automation and Drives division are uniquely positioned to help organizations accomplish their goals faster, smarter and cheaper than ever imagined possible.

problem overview

Although well positioned from a technical standpoint, Siemens Canada A&D find themselves in a highly competitive marketplace and require a sales force that can quickly capture a client and deliver concise professional, competitive quotations. A large percentage of Siemens' business relies on solutions that are "out-of-the-box." For a salesperson who does not have a vast amount of engineering experience, however, determining how to configure an "out-of-the-box" solution can be a time consuming process.

issues facing the client

- ⇒ Slow quotation turn-around times
- ⇒ Inefficient means of configuring a "Drive-In-A-Box"
- ⇒ No sales statistics and accountability for regional managers
- ⇒ No follow-up process to complete the sales process
- ⇒ Lack of consistency in quotations made throughout the nation
- ⇒ Lack of control on profit margins for individual quotations
- ⇒ Lack of interconnectivity between salespeople
- ⇒ Lack of pertinent information in the sales quotation
- ⇒ Inability to quickly create a quotation based on previous quotations
- ⇒ Fluctuations in quotation prices due to a non-standardized process

solution

After performing an analysis of the A&D sales force work domain, Inovex was able to identify the issues listed on the opposite page. The next step involved devising a tailor-made solution that would solve each of these issues. Inovex developed the Siemens A&D SalesHelper – a web-based tool that resides on the Siemens corporate Intranet, providing a simple gateway to create and access quotations throughout the country in minutes.

software components

Drive Configuration Utility

This utility presents the salesperson with specific options for creating a Siemens Masterdrive. Based on the options chosen, the application will automatically determine which components can be added and at what rating. Relying on the program to make these decisions, prevents costly mistakes such as producing a quotation with components that will not fit inside a given enclosure.

The screenshot shows a web-based configuration utility titled "Base Drive". It contains several settings:

- Enclosure Selection: Wall Mount Floor Mount
- Voltage: 460 VAC 575 VAC
- Rating: CT VT
- Horse Power: 15 (dropdown menu)
- Enclosure Size: Standard - 1372 x 330 x 390 (dropdown menu)

At the bottom right of the form, there are two icons: a green checkmark and a red X.

The screenshot shows the "Sales Helper" interface. A "Quotations" window is open, displaying a "Quotation Viewer" for "CURRENT REV: Original". The details shown are:

Field	Value
Quote Number	Q162-3
Creation Date	Jun 28, 2004
Drive Application	Saw Mill
Account Manager	Terry Branch
Quotation Creator	Terry Branch

Below this, "Client Specifics" are listed:

Company Name	Inovex Inc.
Client Name	Mike Branch
Address	220 Wyecroft Road Oakville, ON L6K 3V1 Canada
phone	416-995-8949
fax	
email	mike.branch@inovex.ca

The interface also shows a sidebar with "Your Quotation Success Rate 0%", "# Quotations you have this Month 1", and "# Outstanding Follow-ups 6".

Quotation Manager

This portion of the system allows any salesperson access to all past quotations, but restricts editing access to either the creator of the quotation or the quotation's account manager. Within the manager, the salesperson can follow-up on quotations, specifying whether or not they were awarded or lost due to technical, pricing, or delivery problems.

software components

Quotation Pricing Utility

Once the desired drives have been specified, the salesperson can specify quantity and profit margin in order to bring the total cost to a price that meets both the needs of Siemens and the client. As a security feature, the salesperson cannot reduce the profit margin under a certain threshold without permission from the administrator.

Quotation Basket

Drives Currently in your Quotation Basket:

Drive	Specifications	Qty	Edit Delete
6SE72213EA003AB0	vWall Mount,460 VAC,7.5HP ,CT,Standard,B	6	✎ 🗑

Total Cost
(including warranty)

\$25,914.77

Profit Margin = %

Delivery Time

Package Generation

Included in the quotation package are the following items:

- Quotation Figures
- Cabinet Outline
- Terms & Conditions
- Technical Data
- Siemens A&D Promo

Yes, remind me about this quotation on:

Jan 1 2004

Add Another Drive

PDF Package Generation

After entering all quotation information, a proposal package is automatically generated in PDF format for print or e-mail to the client. The package is a standard format for salespeople across the country and delivers:

- Technical Specifications
- Detailed Quotation Numbers
- Additional salesperson comments
- A&D Promotional Material
- Cabinet Outline and Dimensions
- Terms and Conditions

The image shows three overlapping PDF document pages. The top page is the 'Masterdrive Proposal' introduction, starting with '1.0 Introduction' and a disclaimer. The middle page is the 'Masterdrive Proposal' cover page, prepared for 'Inovex Inc.' on 'Jun 28, 2004'. It includes contact information for the ATTH site branch and a table of contents listing 'Quotation', 'Cabinet Outline', 'Technical Data', and 'Terms & Conditions'. The bottom page is the 'Masterdrive Quotation Package', featuring 'Automation & Drives Highlights' and a list of bullet points detailing technical specifications and terms.

Overall Sales Statistics

	1	2	3	4	5	6	7	8
Bradley, Bob	0.0144	0	0	3	100	0	0	3
Branch, Andrew	0	0	0	0	0	0	0	0
Branch, Terry	0.0316	0	1	5	0	0	0	2
Doe, Jane	0.0085	0	0	1	0	0	0	0
Doe, John	0	0	0	0	0	0	0	0
Totals	0.0433	0	1	9	100	0	0	5

Legend:

- 1 Cycle Time (Avg. Quotations per Day)
- 2 Hit Rate (%)
- 3 # Quotes this month
- 4 # Overall Quotes
- 5 Lost Quotes due to Delivery Problems (%)
- 6 Lost Quotes due to Price (%)
- 7 Lost Quotes due to Technical Problems (%)
- 8 These quotations have been rejected as "Not Quoted" after 30 days

Client Management

Client information can be entered into the client database and managed from the SalesHelper tool. To protect regional sales, clients specific to a certain salesperson are only visible to them, and not to other salespeople within the A&D group. The administrator, however, can view and edit all client information.

Administrative Control

The Administrator of the SalesHelper Tool has the power to easily change profit margins for salespeople on a quotation by quotation basis. Also included in the administrative console are the following features:

- The ability to update the pricing data based on new yearly figures
- The ability to add/remove/edit salespeople in the database and control default profit margins
- The ability to view overall sales statistics and on individual members of the sales team

Salesforce Current Quotation Permissions

Salesperson/Quotation	PM @ 12% min	PM @ 20% min
Terry Branch		
Q-123-456	<input type="radio"/>	<input checked="" type="radio"/>
Jane Doe		
test	<input checked="" type="radio"/>	<input type="radio"/>

Terry Branch

Q-123-456

Jane Doe

test

Process Changes

Cancel

SIEMENS

benefits

Using SalesHelper Siemens Canada now enjoy the following benefits:

- Easy deployment and updates via the Intranet
- Current cost information through one-time cost loading by the administrator
- Easy searching through past quotations using a number of search criteria
- Ability to continuously improve and tailor the sales process to the client based on the feedback received during the follow-up process
- Standardized pricing across the nation
- Standardized proposal documents generated in PDF
- Ability to automatically send proposals to the client via e-mail

Inovex’s solution was able to cater to each issue facing Siemens, creating a highly beneficial tool that has ultimately increased the productivity of the A&D sales force.

Problems solved

Solution Components

	Slow Quotation Turn Around	Inefficient Drive Configuration	Lack of Statistics/Accountability	No Follow-up Process	No Consistency in Quotations	No Profit Margin Control	Lack of Interconnectivity	Lack of Pertinent Info in Quote	Unable to quote based on past	Fluctuations in Quotation Prices
Drive Configuration Utility	✓	✓			✓				✓	
Quotation Manager	✓			✓		✓			✓	
PDF Package Generation	✓				✓		✓			
Quotation Pricing Utility	✓				✓	✓				✓
Client Management	✓						✓			
Administrative Control	✓		✓	✓		✓	✓			