



CASE STUDY ROUND-UP SERIES

Expanding Capabilities in the Sales Enablement Process through Citizen Development

AT A GLANCE

Partners

- Quixy
- Pipefy
- AUTTO
- Joget

Customers

- Fenesta
- CTA Smart
- Wi5
- Seimens

INTRODUCTION

This month we are bringing you real-life stories on how citizen development can expand capabilities in the sales enablement process.

Most salespeople are given high expectations such as hundreds of calls and emails daily, intimidating closing rates, and proper documentation along the way. In today's business world, the sales process has become so much more than just closing the deal.

For most organizations, a large amount of their data entry and document processing falls on the sales team. The challenge is manual entry paired with tight deadlines, which typically result in errors that cost organizations time and money.

For the sales process to be to be successful there needs to be an organizational shift that focuses on efficiency and accuracy. Additionally, when day-to-day processes are able to be completed with ease, more time and energy can be focused on strategic work and further improvements.

Continue reading to see real life examples of how our partners are helping organizations across the world successfully automate and expand capabilities throughout the sales process with the power of Citizen Development.



"With clear processes, defined deadlines, and reliable performance data from different areas, we can make faster and clearer decisions."

BRUNO LOPES
CEO of CTA Smart



FENESTA - MANUFACTURING

Quixy's platform capabilities helped Fenesta to smoothen its sales requisition process with automation.



Problem

- As the number of sales orders requests grew, it became increasingly difficult to process them on time. The dedicated department would manually handle all their sales requests through emails and reminders, which was prone to errors, and requests would end up buried in the email trails.
- The salespeople would not have any visibility into the request's status. This would expose the company to the risk of losing customers, as the salesperson would not have the necessary confirmation to close the approval.
- The lack of control over the whole process and no standardized format to enforce the workflow would create a lack of satisfaction and impact customer experience in their interaction with sales team.



Solution

- After a thorough study of the current workflow process and identifying the gaps in the workflow, the team created a robust process plan and decided to incorporate the same in the Quixy platform for Fenesta.
- Through Quixy's platform, the whole feasibility process was automated. Sales executives using any device and from anywhere were able to submit their feasibility requests, which follow a pre-defined workflow.
- All feasibility requests generate a Unique Requisition ID through which TAT(Turnaround Time) is calculated. This allows the sales executives have the clear view of the status of the request in the workflow.



Outcome

- The business process workflow in Fenesta after implementing Quixy's resulted in complete control over the process and absolute transparency for the initiator to determine the request's current status.
- The use of Quixy's platform has resulted in higher sales team satisfaction as the tedious tasks of manual sending of reminders and follow-ups were eliminated.
- Mandatory form fields resulted in accurate collection of information which was before prone to errors. In built business rules validations ensured that the requests is been routed in the right direction.
- Fenesta has been increasingly expanding the scale of usage of Quixy in the company.



"We have got more than 50% time-saving after implementing as the follow ups, calls, emails and resending of tasks got eliminated and SLA adherence has also become more than 99%."

HIMANSHU ARORA

Digital Transformation Manager



CTA SMART - ADVISORY SERVICES

Through process management & automation, Pipefy enabled CTA Smart to increase sales by 300%.



Problem

- With CTA Smart's high volume of customer and supply points, the lack of standardization and use of about eight disconnected systems prevented the commercial team from being agile enough to scale their sales.
- insufficient connection between systems also impacted other departments' work, such as finance, customer support, and production. These teams didn't receive all the information they needed to manage their respective processes efficiently, often delaying deliveries for contracts and services.
- CTA Smart's top leadership was also struggling to consult and control the company's operational metrics. Without integration and clarity of information flows, the strategic team was constantly unable to collect consistent data.



Solution

- The first process implemented in Pipefy was Sales CRM, followed by several operational processes — such as customer logistics and customer onboarding — and constructing their customer base.
- Following Pipefy's deployment, CTA quickly began leveraging improvements in their daily routines. Data no longer had to be manually typed, which reduced rework and increased information consistency across sectors.
- Additionally, CTA increased efficiency by automating repetitive tasks, such as sending emails for customer onboarding, filling in customer information, and assigning professionals to each task.



Outcome

- After about 2 years, CTA now manages more than 40 different processes within Pipefy and 95% of its employees have direct contact with the platform.
- The operational and commercial departments now have clear metrics and ambitious goals, both controlled by the company's managers through dashboards extracted by Pier in cooperation with the teams.
- Previously, CTA Smart used to take an average of 90 days to close a deal with a customer. Today, running this process in Pipefy, the average time decreased to 42 days — an improvement by 53%.
- The desired scalability is also an achievement. After one and a half years using Pipefy, sales increased by 300% — helping to take CTA's operation to the next level.



"Pipefy allowed us to have better visibility of our operation. With clear processes, defined deadlines, and reliable performance data from different areas, we can make faster and clearer decisions."

BRUNO LOPES

CEO



WI5 - HOSPITALITY

By building workflows through AUTTO, Wi5 was able to create an online interface to guide staff through the steps needed to collect vital information, ultimately saving hours of time.



Problem

- As the sales and customer service team at Wi5 increased, the steady stream of contracts vital to the business became difficult to manage. This was especially relevant to non-disclosure agreements (NDAs) required from every new client.
- One of the big challenges for Wi5 was that it was too easy for staff members to make errors in clients' company information.
- For example, all limited companies have a unique company number, supplied by Companies House. If the wrong company number is used in a contract that contract is not valid.
- This resulted in a lot of time spent checking company numbers for accuracy.



Solution

- With AUTTO, workflows can now be built by dragging and dropping elements that automatically create an online interface to guide staff through the steps needed to collect vital information needed for routine documentation, such as contracts and NDAs.
- One of AUTTO's features that was key to success was the ability to ensure that the correct company name and number are used in every document.
- Even if a staff member puts in a completely wrong company number, the company name that the system pulls through is incorrect and immediately obvious, not only improving accuracy but also making it easier to check.



Outcome

- The interface Malik builds with AUTTO workflows is intuitive and needs little training, decreasing human error while increasing the ability to spot errors quickly.
- With all members of the sales team trained on the platform, important documents are now more consistently accurate.
- Documents that used to take 15 minutes now take less than a minute to check. AUTTO has given Wi5 the ability to check close to 100 NDAs in an hour, saving time and allowing the team to focus on more strategic work.
- Wi5 continues to add more features that assist the company in saving time and increasing the efficiency of the sales and legal departments.



"I felt shoehorned into many of the things I looked at, as if I was trying to create something with a product that had a different purpose. This is not the case with AUTTO. It does exactly what I was looking for."

ASIF MALIK

General Counsel & CFO



SIEMENS - HEALTHCARE

Powered by Joget, Siemens Healthineers were able to build a system to handle the increase in the Siemens projects bidding business while achieving standardized management of the project bidding process, improve management efficiency and information sharing transparency across regions and countries.



Problem

- Siemens needed a standardized bidding system to allow regional and global bids to be submitted for medical or healthcare related projects in a fair and transparent environment.
- A system is needed in order to standardize and improve the management efficiency, transparency and traceability of information through the local bidding process.



Solution

- A Global Bidding Approval System was built on the Joget Platform to establish, supplement and improve bidding information for the bidding of projects.
- Ability to start LOA process by Tender status and key information system control; and automatically determine the LOA Level according to checklist options and summarize non-conformity items.
- From a regional perspective, each management role from related regions, provinces and product lines, will have to check their own respective and relevant tender and project information to bid on the tender.



Outcome

- A Regional Bidding Approval System was also built to establish, supplement and improve bidding information for the bidding of projects, e.g. the classification control needed for the necessary control of supplementary information, etc.
- The system has the ability to start LOA process by Tender status and key information system control.
- Automatically determine the LOA Level according to checklist options and summarize non-conformity.



CASE STUDY ROUND-UP SERIES

Expanding Capabilities in the Sales Enablement Process through Citizen Development

IN SUMMARY

Citizen development supports sales enablement by eliminating manual entry, automating repetitive tasks and facilitating an environment where information is more accurate and updated in real-time.

Three common themes from our featured case studies:

Efficiency:

Before citizen development: Many of the featured organizations were still relying on manual entry throughout the sales process and spending hours revising information to ensure it was correct.

After citizen development: Documents, processes, and metrics that once took hours to revise now only take a few minutes, allowing the sales teams to focus on other goals and initiatives.

Automation:

Before citizen development: The overall sales process was slow and tedious, which caused errors in efficiency as well as delays in document submission, order fulfillment, etc.

After citizen development: Repetitive tasks such as data entry and email sends were automated, which reduced overall time spent and increased information consistency.

Continuous Improvement:

Before citizen development: Due to lack of technology, sales teams relied solely on outdated methods such as manual entry and paper records that were both time-consuming and prone to inaccuracy.

After citizen development: Empowered Citizen Developers have the skills and technology to increase efficiency and accuracy in the sales process.

FEATURED ORGANIZATIONS

Fenesta



Fenesta is India's largest windows and doors brand and a part of Rs 8,308 crore, 1889 Est. DCM Shriram Group is acknowledged for its transparent work culture and diversity. Empowered with knowledge of India's extreme conditions, Fenesta has designed uPVC and System Aluminum Windows and Doors that can withstand India's harsh climate.

CTA Smart



CTA Smart is a national leader in the control and management of internal fuel supply. The company has 10 years of expertise in the market and helps customers to enhance their fuel and fleet management — saving time and money. The company supplies more than 3,000 refuelling points, controlling about 1 billion liters of fuel in 2021.

Wi5



Wi5 provides the hospitality industry with a fast and secure mobile order and pay solution that allows their customers to place orders and make payments on mobile phones.

Siemens



Siemens Healthineers is a leading medical technology company with over 120 years of experience and 18,500 patents globally. With over 50,000 employees in more than 70 countries, the company continues to innovate and shape the future of healthcare.