

CASE STUDY:

CRM in the Palm of Your Hand

AM&C finds wMobile's cell phone-CRM interface to be a savvy sales solution for their sales team.



Applied Measurement & Control
appliedmc.com



"Good leadership drives great systems!" That's the enthusiastic response Kim Cruise offered when asked about the savvy, tech-smart tools she administers at Applied Measurement & Control. AM&C is thrilled about their newest implementation of wMobile, a powerful web client that brings CRM data to the cell phones of their sales staff—and Kim was talking about her boss, Sam Messer, the president of AM&C.

"Sam's so forward thinking about buying tools to support our work. Our sales folks are on the road literally all the time. They needed something amazing to help them get information about their contacts in a heartbeat—and also to put information back into their CRM equally fast. And we wanted it on their phone. Sam just asked me if wMobile would help them. I said yes, and he gave it the thumb's-up."

AM&C serves companies who make and process stuff: stuff that runs through pipelines, stuff that needs to be weighed, stuff that is subjected to pressure, stuff that must be made under strict temperature controls. Translated, AM&C's clients range from companies that make food and beverage products to biotechnology manufacturers to nuclear power facilities to municipal water and sewer systems. AM&C serves their clients as representatives for about twelve control and metering manufacturers.

Anyone who understands the challenges of being a manufacturer's rep in a strict territory can understand the need to support the sales team.

"We have a small sales force which needs to stay aware of which companies' equipment might be aging out and what new companies are locating in our territory. We use Frontrange's

Goldmine CRM, and we've integrated it extensively with some powerful partner software. Our Goldmine contact records have sophisticated but simple integration that ties them tightly to our quoting software, Quotewerks, as well as MasterMine and Stonefield Query for great, fast reporting. But the minute our salespeople left the building, there was a huge flaw in the system: no access."

“

"We looked at a potential mobile integration to connect our database with the internet, but I didn't like it at all," said Kim. Her GoldMine consultants, Geoff Boulden and Bob Lozinak of Twelve/Three Marketing, suggested to Kim that she look at a company called W-Systems. "He told me they have a product called wMobile that could log directly into our GoldMine and give us real-time data. I did a demo and immediately got in touch with W-Systems, because wMobile was exactly what we needed."



Learn more at www.w-systems.com

wMobile, developed by W-Systems of Ramsey, New Jersey for users of GoldMine CRM systems, allows users to access GoldMine data from their cell phone, tablet or laptop, via a lightweight web client. With both a mobile and desktop interface, wMobile's secure access via a browser protects data while it streamlines calendaring, emailing, client data and offers direct dialing to contacts.

"You can open a client's database record from your phone, and dial them automatically." Kim was delighted to learn that wMobile even offered instant mapping and directions from the office to the client facility, based on the address in their contact record.

Kim works as CRM manager and webmaster for AM&C, but "really, I do anything and everything technology oriented. Pretty much I'm responsible for any device with an 'on-off' switch, so of course I worked with W-Systems on this."

Her liking for wMobile only deepened from her experience working with W-Systems. "Because of the way our contact management system is used, we requested some changes to wMobile. W-Systems not only accommodated our request, they engaged with us completely in the change process."

Kim explains, "W-Systems gave me the updated .exe file to approve before they released it to the public. We received tons of attention working one-on-one with them. They really stayed right with me. We'd be instant messaging their development team while working on a shared screen. I was delighted."

And the response of the sales staff? "Oh, let me tell you! As soon as we got it on their phones—a really simple process because we just put in a shortcut to a website—they immediately saw the value. Emails they sent from their phones

landed right in the customer's history. Notes they'd made about the facility were instantly available. A customer asked for an appointment, they could immediately check their calendar and set a date. Everything about it allowed our sales people to give their customers a feeling of good control and better management. How critical is that to client development and retention?"

AM&C sells only to companies in New York State. They started as a small company with a limited territory, and expanded business in two ways: the growth of new and existing companies in our territory and through acquisition.

"With limited territory, we have work very hard to make sure companies in our region look to us as experts. Our sales engineers don't just try to sell pressure valves or flow meters," said Kim. "They're 'roll up their sleeves, climb on equipment and get their hands dirty' kind of guys. Each facility we serve has very specific and unique requirements. Every building and system is different from every other one. We get to know their unique qualities and needs—and we can respond to those needs by offering products from several vendors. We're experts who can give them no-nonsense, knowledgeable guidance on which products will work best for their system."

For an example, Kim talked for a moment about nuclear energy facilities. "They need really serious, elite systems of checks and balances. The temperature of their cooling tanks, and the amount of pressure in the reactor pressure vessels are critical." Applied Measurement & Controls knows what equipment has the extremely fine tolerances required to keep the nuclear energy system operating safely. "We do extensive work keeping current on each manufacturer's offerings. Our clients can trust our engineers instead of having to become expert themselves on the many, many options available."

Kim defers to AM&C's leader once more. "I need to acknowledge our president Sam [Messer] again. He not only has an excellent leadership in managing our company, he's been brilliant about choosing the companies we represent. It's like baking a cake and choosing your ingredients. He's got an innate sense of a good recipe for deciding what manufacturers will serve our clients best."

Asked about investing in wMobile, Sam had one question:

Does it enable us to receive and send emails to contacts and have those emails be part of the customer record? "If the answer was yes, it didn't matter what it cost—but wMobile is very affordably priced. Having a boss like that makes my job a great collaboration. It's in his personality to see the value of technology in his personality—just a natural leadership quality. So wMobile was an easy 'yes' for him."

Asked about any issues with installing wMobile, Kim demurred. "Our installation went very smoothly and easily. There were no 'ouches' in our relationship with wMobile. They told me they want to make sure each person had a very good experience with them. Well, I did—and I still do."



Everything about wMobile allowed our sales people to give their customers a feeling of good control and better management. How critical is that to client development and retention?

Kim Cruise, CRM Manager & Webmaster