



# Full visibility of the sales process for increased efficiency and profit



“ *The CRM solution implemented by Matricia provides us full visibility over the entire sales chain from stocks and orders through distributors, end customers and competition down to promotions and targets, all in one easily accessible place.* ”

Cezar Popescu, Commercial Director

### Challenge

Boromir needs qualitative, unitary, up-to-date and consistent sales information easily accessible at any time by its sales staff and managers.

### Benefits

- Consistent and centralized data
- Unitary working and reporting environment for Area Sales Managers and Key Account Managers
- Smooth and structured information flows within the sales department
- History of sales activities
- Correct evaluation of the sales process and analysis of end customers (distributors' clients)
- Rapid adjustment to market changes
- Improved communication with direct clients and distributors' clients

### The Customer

BOROMIR IND is one of the largest groups of companies on the Romanian market of milling and pastry production.

The company was set up in 1994 in Ramnicu Valcea and continued to expand by taking over other companies and purchasing new production lines in key locations of the country such as Sibiu, Buzau, Iasi, Deva, Hunedoara, Slobozia.

Today, BOROMIR group controls over 10% of the Romanian milling market and owns 5 mills of different production capacity, as well as several factories of pastry products, pasta, biscuits, traditional pretzels and bread products.

In 2010 Boromir group generated a turnover of 110 mil. Euro.

### Business Situation

In terms of sales structure Boromir group is organized into three divisions according to the products distributed (Milling and Pastry; Pastry; Sugar Products) and a fourth division named Key Accounts, all sharing the same hierarchical structure: National Sales Director, Division Manager, Regional Managers – RMs, Area Sales Managers – ASMs, Sales Agents - SAs, Merchandizers and Key Accounts - KAMs.

In terms of distribution channels, Boromir sells mainly through distributors which are serving approximately 40.000 end clients. Having the distributors as direct clients, Boromir is holding few information on its end customers (the distributor's clients). However, the sales distribution and the circulation of Boromir products to end clients is



crucial and in order to make correct and justified decisions to increase sales, Boromir needs more detailed information on these particular customers.

At group level Boromir has 3 software systems implemented covering three specific business areas.

The **ERP** system covers the accounting, financial and logistics areas and is meant to collect, process and report quantitative information from the group's companies. From a sales point of view, the ERP system is centered on the direct customers invoiced by Boromir.

The **Sales Force Automation system** is used by the sales agents to collect from the field primary data related to: distributors' orders, end customers to which distributors deliver the products and information regarding the presence of Boromir's products on the shelf.

Orders from direct clients (distributors) collected by sales agents and ASMs via SFA are imported into Scala. The rest of the information is stored in SFA and used by ASMs and sales managers but remains independent of the sales information existing in the ERP system.

QlikView is the **Business Intelligence** tool dedicated to the Top Management, which shows the situation at holding level. QlikView reports are strictly based on the information registered in the ERP system but do not provide qualitative information on the sales.

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### The Challenge

With three software systems implemented in the group, there was apparently little need for a fourth one. However, the systems had certain shortcomings in terms of providing the essential qualitative, unitary and consolidated sales information that was needed.

The ERP does not register qualitative information related to sales, plus the information in the ERP is divided on the three companies of the group, so it is rather difficult to obtain aggregated information on sales and products at group level. ASMs have access to sales information only indirectly by running ERP reports at the company's headquarters.

SFA is only meant to store information without further processing,

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*Our sales force now has unique tool which facilitates their work. It allows the timely and accurate input and exchange of information which is essential for an efficient communication with our customers, correct management decisions and consequently improved sales.*

Cezar Popescu, Commercial Director

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whereas QlikView reports are only available to the top management.

As a consequence, the purpose of the CRM system is to centralize, organize and display information about end clients, distribution of Boromir products and sales activities in a unitary and coherent manner. The quantitative information extracted from the ERP system can be corroborated with the qualitative information collected from the market and valuable analyses can be made.

At the same time, ASMs and KAMs could have a dedicated workplace and a unified reporting tool that provide quantitative and qualitative analyses of sales results at the level of the teams or areas they manage. Essential information for their activity such as market research, information about competition, distributors, distributors' evaluations, targets, call reports are currently stored on various supports (excel, word, etc.) without being consistently centralized and analyzed.

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### The Solution

Matricia Solutions implemented iCare for Distribution - the Customer Relationship Management application, developed by Matricia based on the Microsoft Dynamics CRM platform.

The CRM system consolidates data from two external systems, the ERP and the SFA, as well as from its own interface and stores them in a unitary manner: a single database.

The CRM centralizes information from all companies defined in Scala such as: Boromir agents, direct customers, Boromir products, promotions (promotion information can be input into the CRM system so it can be taken into account for the calculation of the target achieved), outstanding invoices (the CRM daily takes over the information about outstanding invoices).

The CRM and SFA systems will interchange information on Boromir's indirect clients, the end customers visited by the sales agents together with the distributors' agents.

The integration platform is an SQL database acting like a buffer where, as the case may be, the two systems will deposit the information needed for integration.

From SFA the CRM takes over information regarding distributors, contact

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*The CRM solution does not replace but integrates perfectly with our ERP and SFA software and capitalizes on the information provided by them.*

Cezar Popescu, Commercial Director

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persons, products, client calls, products on the shelf and orders, competition's products on the shelf, return orders, sampling and target.

The CRM system allows the direct registration of essential information for Boromir's sales staff:

- distributor file – a full report including information about the client (distributor) from three sources: the ERP collected by the ASM on the field; from the ERP; and collected from end customers through the SFA.
- sales conditions and change of sales conditions form – ASMs have access to this information for each distributor; a summary of the contract is prepared from the headquarters and sent automatically through the system to the ASM or by the ASM himself. The ASM can request a change of sale conditions through a standard form which he fills in and transfers to the headquarters. All requests remain available in the system, either rejected or accepted and transformed into a contract appendix.
- new client file – the ASM can propose a new distributor (client) to the management by inputting the data collected directly into the CRM
- information about competition – the ASM can collect data about the competition and competition products and define it in the system for full and thorough analysis
- product focus and products of interest, promotions and marketing campaigns
- competition prices collected by the ASMs from the market can be kept in a history and compared to Boromir prices.

The CRM is also the tool for defining and calculating achieved targets. The Regional Manager inputs the annual/monthly target per divisions, categories of products or regions and it is automatically distributed to the ASMs on distributor and agents level. The achieved target is calculated daily based on the sales registered in the ERP on the 4 companies.

The CRM also provides the ASMs valuable reports for their daily activity such as: market share, product market share, number of end clients and potential customers, number of clients visited in a certain period of time, products distribution, statistics regarding the presence on the shelf or orders taken by the sales agents, sales, sales vs. income, set vs. achieved target etc.



### Benefits

- Information from three different systems (ERP, SFA and the CRM) is centralized in one system for consistent and complete information
- A single workplace for ASMs and KAMs to view sales data online and replace the cumbersome ERP reports, Excel and Word files, e-mails, organizers, etc.
- Management decisions are instantly available to ASMs; information collected by ASMs on the field is available to sales managers in real time
- Information input into the system is saved and can be used for later analysis
- Qualitative information regarding the sales activity
- Flexible and easily configurable system which allows the implementation of new processes
- Proper management of e-marketing campaigns and promotions



- Easy and convenient access to consistent information
- Proper management of sales activities
- Better decision making based on accurate and timely information
- Improved communication within the sales department
- In-depth analysis of sales results and processes
- Better focused marketing campaigns based on relevant data about end customers

### For More Information

For more information about iCare for Distribution – powered by Microsoft Dynamics CRM and other solutions provided by Matricia Solutions, please access [www.matricia.ro](http://www.matricia.ro) or get in touch with us at [office@matricia.ro](mailto:office@matricia.ro) or +40 21 2326232.