

“The fact that Sofon supplies standard software with no customizations sounded good to us”



f.l.t.r. Hans van Lier STRATEGIC ACCOUNT DIRECTOR OIL AND GAS  
Rick Lambrechts INSIDE SALES MANAGER

For this *Customer Story* we talked to Hans van Lier (Strategic Account Director Oil and Gas) and Rick Lambrechts (Inside Sales Manager) of Pentair's Dutch branch in Breda. This branch sells drives and circuit breakers – mainly from their own Pentair factory – in the Dutch market. Pentair supplies a customer-specific construction of these products to industrial installers and industrial end users: factories in which steam, water and gas are processed or moved. Pentair was looking for a way to improve their quotations both in terms of content and of design; Pentair got in touch with Sofon...

## Pentair enjoys getting more done with the same sales capacity

### WHOLE QUOTATION AND ORDER PROCESS IMPROVED

Pentair was quick to discover that there was a lot more to improve than only the content and design of their quotations. Van Lier explains: “We found we could improve our whole quotation and order process with Sofon. Quotations would be rapidly and accurately produced and data would no longer need retyping manually in ERP when a request became an order.”

### COMPETITORS

Pentair also gave Sofon's competitors a serious chance during the orientation phase. Van Lier explains: “But the Sofon software really offered more flexibility. And the people we came into contact with at Sofon clearly knew what they were talking about and listened closely to what we wanted. The fact that Sofon supplies standard software with no customizations sounded good to us. If we would work with a customized system, we would end up with different versions per country or per branch and we would be dependent on expensive, time-consuming programmers. We definitely didn't want that.”

### SOFON DAY

Once the decision to go for Sofon was made, implementation started. Lambrechts continues: “Sofon gave us great guidance from a consultant with a lot of experience. He presented us with a detailed plan, worked out step by step, so it was clear which steps we needed to take to make our deadline. We formed a team of three product specialists, an IT person and myself. Tuesday was renamed as ‘Sofon Day’. On that day we could work exclusively on Sofon, without being disturbed. For us this was a good choice. The Sofon Day gave us speed and familiarity with the software. If an implementation is ad hoc, things will easily come up and slow the process down.”

### TEAM

The teamwork brought Pentair many advantages. Lambrechts explains: “Every colleague has a different solution for the same problem and you choose the best idea from them. And if a colleague leaves the company, his or her knowledge is not all lost. That danger exists if you put only one person on the implementation.”



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### CLEARING UP

The biggest job the team encountered was clearing up data. Van Lier goes on: “Over the years mistakes tend to creep into your data. Other data turns out to be duplicated, and some data is even absent. With Sofon this kind of thing really gets sorted out. And that is definitely necessary to prevent mistakes in quotations and all the problems this causes.”

### IMPLEMENTATION

After preparing for about half a year, Pentair is operational with Sofon. Quotation processing within the organization is now mainly automated. Lambrechts comments: “We now really see the advantages of Sofon on a day-to-day basis. Like most Sofon customers we now generate error-free quotations much faster. We have also seen our service improve. Previously, if an adjustment in a quotation was necessary, you could pretty much hear the sighs in the Sales Office. That was understandable, as the entire quotation would have to be re-calculated. Now Sofon does that automatically for us and it is a real pleasure to promise customers a new quotation within five minutes.”

### SPARE PARTS

Pentair now offers complete quotations that include optional spare parts. These spare parts were previously often not added. Van Lier continues: “Sofon automatically offers a ‘spare parts quotation’. This is very handy for the customer as spare parts are often needed; to us, this means that the value of our quotations increases.”

### MORE WORK WITH THE SAME SALES CAPACITY

By using Sofon, a lot of time has been freed-up. Van Lier: “We can get more work done with the same sales capacity. And that is necessary in these busy times. Because we work quickly, our quotation reaches the customer sooner.”

### MORE POSSIBILITIES

Pentair sees more and more possibilities to use Sofon. Lambrechts: “You never finish improving things with Sofon. There are so many possibilities. We can produce different sales documents with Sofon, include scale sketches in sales documents, and give our customers and service engineers access to Sofon... The options are limitless.”

## WHAT HAS PENTAIR ACHIEVED WITH SOFON?

- Quotations improved in terms of content and design
- Data is correct. Mistakes in quotations are prevented
- Impressive processing speed in generating quotations
- Standard software now in use
- Improved service: adjustments in quotations become much simpler
- Automatic offer of spare parts
- More work done with the same sales capacity

