

Case Study: inside Sales Optimization and Improve Customer Experience

Background:

A \$1 billion refrigerated systems manufacturer had inherently cumbersome and dysfunctional processes characterized by antiquated systems, tools, and broken procedures.

Challenge:

The challenge at the company was the presence of kludgy and broken processes, particularly within the high-touch inside sales and customer service functions. The antiquated systems and unclear processes were impeding operational efficiency, resulting in an extended turnaround time for complex configurations and a lower sales quote win rate.

Approach:

CXMD was brought in to address the inherited challenges by a deep dive into the processes of high-touch inside sales and customer service agents which was imperative. Leveraging Kaizen and Gemba walk methodologies, CXMD systematically uncovered waste in the existing processes and identified areas for improvement. One key revelation was the lack of clarity in minimum customer information requirements for quoting and ordering. This led to the creation of an intake form, effectively communicating expectations and streamlining processes. Additionally, recognizing the inefficiency of manual data entry for circuit information, the process was outsourced to cost-effective resources in India. Furthermore, standardization of products continued to minimize inside sales work effort. Simultaneously, strategic products that were not integrated into the main quoting/ordering tool were identified, prompting the initiation of an IT project for integration.

Solution:

The comprehensive solution involved not only addressing immediate inefficiencies but also strategically reorganizing and integrating processes. The introduction of the intake form clarified customer information requirements, reducing ambiguity and streamlining operations. Outsourcing mind-numbing and time-consuming tasks to India enhanced cost-effectiveness, and integrating strategic products into the main tool increased overall system efficiency.

1. Quote Award: Compress quote generation timeframe in order to position for higher quote award through Kaizen and Gemba techniques driving process improvements.
2. Performance Management: Monitor the workflow for improvement opportunities.
3. Customer Satisfaction: Improve customer satisfaction to address the customer expectations of a quick turnaround for the internal decision making.
4. Standardization: Drive more products to set standards utilizing templates.
5. Workload Redistribution: Re-balance workload amongst the inside sales team and leverage India center for less complex quotes and configurations.
6. Tool Updates: Input more products through IT/Tool Quote platform to speed quote and configuration turnaround.

Results:

The results of these strategic actions were impactful. The average turnaround time for complex configurations, previously at 4.5 days, was successfully reduced to 3.5 days. This marked improvement showcased the effectiveness of the implemented changes in optimizing processes and maximizing operational efficiency.

Conclusion:

This case study at this manufacturer underscores the transformative power of strategic interventions in addressing complex operational challenges. Through a combination of Kaizen and Gemba walk methodologies, along with targeted process improvements and integrations, the team not only streamlined operations but also significantly reduced the turnaround time for complex configurations and quote generation. The success at this company serves as a testament to the effectiveness of proactive leadership and structured approaches in optimizing processes and achieving tangible results with better win rates.