



CURTISS- WRIGHT

CASE STUDY

INDUSTRY

Aerospace & Defense

APTEAN SOLUTION

Pivotal CRM

CHALLENGES

- Business processes were managed manually by spreadsheets, which was very time consuming
- Tasks were assigned and managed through spreadsheets and Word documents, making it cumbersome and inefficient

BENEFITS

By putting certain business processes directly into Pivotal, Curtiss-Wright has seen:

- Significant ROI with the integration of customer interactions
- An increase in ROI by integrating tasks and to-dos directly into Pivotal
- Greater efficiencies for the sales team in responding to opportunities and leads

CUSTOMER DETAILS

With roots stretching back to Orville and Wilbur Wright, and Glenn Curtiss, the father of naval aviation, Curtiss-Wright is a world-renowned provider of highly engineered, technologically advanced products and services for the commercial, industrial, defense and power sectors. Curtiss-Wright was born from a merger in 1929 between their individual companies: the Curtiss Aeroplane and Motor Company and Wright Aeronautical Corporation and became the largest aircraft company at the time.

A publicly traded company for over 85 years, Curtiss-Wright leads the way in providing its customers across the globe with innovative products and services for high performance platforms and critical applications. The technologies developed by Curtiss-Wright provide increased safety, reliability and performance in the defense industry.

A key part of Curtiss-Wright's vision is its commitment to achieving total quality by meeting its customers' expectations and delivering products and services in a timely fashion. Curtiss-Wright is known for its long-standing customer relationships and its company culture has always been highly committed to investing in business solutions, including CRM, which is considered a critical component.

As a result, Curtiss-Wright's Defense Solutions division chose Aptean's Customer Relationship Management solution, Pivotal CRM, to help support its customer focused values.

THE INITIAL CHALLENGES

Like many companies, Curtiss-Wright saw the need to implement cost-savings and better efficiencies in handling its customer responses, sales opportunities and task management. Since these processes were handled manually at Curtiss-Wright, they created a drain on employees' time and a barrier to quickly responding to customers. The company looked to Pivotal CRM as a solution to those challenges.

Pivotal CRM integrates operations once manually achieved with large Excel spreadsheets or Word documents to a system that enables timely responses to customers as well as streamlined management of leads and tasks across the company.

PROBLEM SOLVED WITH PIVOTAL

Curtiss-Wright has been using Pivotal CRM since 1999 and upgraded to version 6.0 and Service Pack 9 in September 2011. Pivotal allows users to view contact and company records, see interactions, make notes and send emails or quotes, as well as view any issues or problems. Curtiss-Wright's internal team was able to configure and customize Pivotal themselves after training from Apteon.

Pivotal gives end users the ability to create custom form designs and create reports – basically, everything short of actual programming. With its intuitive and easy-to-use nature, it is readily adopted by multiple customer-facing departments within a company that need access to one system where all customer activity can be quickly found in a single location. Pivotal helps reduce time spent searching for all the pieces of the puzzle and enabling users to provide customer service in a timely manner.

Pivotal can be accessed on mobile laptop PCs, enabling full access to Pivotal in a completely disconnected mode. This allows Pivotal to function as the central nervous system for various customer related activities and helps solve the challenges of manually completing business processes.

FROM INEFFICIENT TO STREAMLINED

Pivotal's key feature is its highly customizable and flexible architecture. It can be personalized right down to user level, and unique business processes can be captured, created and managed all from within the system. The Power Toolkit is a useful feature when installing Pivotal or customizing it for the first time. It enables users to create new record tables based on individualized needs.

Pivotal contains many different record types: customer, company, opportunity, and allows for the addition of customer pain points directly into the system. Emails are automatically generated and linked back to the customer's issue recorded in the system. This enables immediate response to the customer and does away with numerous spreadsheets where issues often are captured for later review. Timely responses result in large ROI savings company-wide, significantly freeing up users' time for other tasks.

Pivotal also saves valuable time and increases ROI by improving accountability with customized to-do functionality and task management system within the system. Users can track their tasks in one single location, keeping right on top of their workloads and managing great customer relationships without having to work with disparate, unresponsive spreadsheets.

PRODUCTIVITY PACK REENERGIZES PIVOTAL

A new feature of Pivotal that Curtiss-Wright implemented is the Productivity Pack which "rejuvenated the entire experience within Pivotal," according to Mike Ostendorf, CRM Project Manager at Curtiss-Wright Defense Solutions division. Productivity Pack allows users to create, manage and navigate data faster. It was deployed in less than two hours at Curtiss-Wright, and after the initial training, much like Pivotal itself, is intuitive and very easy-to-use.

One of the best features of the Productivity Pack, in Mike Ostendorf's opinion, is the E-Template functionality. "On a day to day basis, our focus is on making life easier for the sales team. This is the case with E-Template. Users can create email templates from any record in Pivotal – be it a company, contact, lead or opportunity – with a simple right click. For example, one of our templates automatically shows what a lead or customer has downloaded from our website. It can also be done with single or multiple records, and the email is automatically linked back to the record," says Mike. "It has saved approximately 25-30% of time, or 1-2 hours per week, for each salesperson."

The Productivity Pack also enables opportunities to be integrated with Crystal Reports, allowing users to send quotes in PDF format directly to a customer. Opportunities can be shared via hyperlinks, saving time and removing potential bottlenecks from manual processes. With the Productivity Pack, edits or additions to records can be made to a single record or in bulk, a much needed timesaver.

Aside from the huge time savings that companies can realize with the Productivity Pack, the integration of Pivotal with Outlook (and with website and marketing automation tools, such as Eloqua), also provides improvements to managing leads. For example, it eliminates the potential for duplicate records and can make the day-to-day lives of sales teams much easier.

A FLEXIBLE, AFFORDABLE APPROACH TO CRM

Pivotal CRM has helped Curtiss-Wright streamline its business processes, getting rid of cumbersome Excel spreadsheets and time consuming tasks, and replacing them with automation and a unified system. This improves productivity and ensures that customers receive outstanding service, supporting Curtiss-Wright's reputation for having long-standing customer relationships.

Mike Ostendorf notes that he is always under scrutiny to ensure Curtiss-Wright has the best systems in place, and with Pivotal CRM he knows that is certainly the case. The Pivotal team strive to bring its customers the best solution possible. Curtiss-Wright was part of the Beta testing team for Pivotal's newest version, 6.5, which was released early 2015, and is excited about this new release and the new UX client which is also now available.

Interested in learning more about Apteian's Pivotal CRM? Please contact us at 1.855.411.2793 or email us at info@aptean.com.



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