



Customer Success: General Kinematics

Founded: 1960

Industry: Machinery

HQ: Crystal Lake, IL

Solution: Salesforce Sales Cloud, Partner Communities, Pardot & Duet360 for Infor Syteline (CSI)

Project Duration: 10 weeks

World Class Integration for World Class Manufacturing

General Kinematics (GK) is a world class heavy equipment manufacturer for the foundry, mining, and resource recovery industries. The engineered systems utilize the latest cutting-edge technology to solve the most challenging material processing requirements in a low maintenance, energy efficient manner.

Integration to Optimize Decision-Making

When Jim Egan, now Vice President of North America Sales and Marketing interviewed with GK, the executive team was transparent about their sales management challenges. To manage the company's growth plans, they required a world class CRM solution with integration to back office systems.

The challenge was clear and three months after he joined GK, the executive team approved the purchase of Salesforce and the plan for integration to Infor CSI (Syteline). "GK was in growth mode. Managing the business from MS Outlook and spreadsheets just wasn't going to cut it," Egan stated. Salesforce platform powered with customer information from the back office would offer the most complete picture of the business.

Egan contacted Endowance and following several discovery sessions received a proposal for deploying Salesforce and the integration with Syteline. At that time, another vendor was selected that had worked with Egan's previous company. They were confident they could successfully integrate the systems; data is data, right? GK quickly learned not all vendors are created equal. It became apparent the company lacked integration experience and failed to deliver.

Endowance Duet360 Enterprise Gets it Right

With an integration that was not delivering results as promised, Egan received an email from Endowance describing the Duet360 Enterprise integration product. A discussion and demo were scheduled. Duet360 is a cloud-based solution built to effectively deliver Account, Contact, Sales, and customer transactional information to all business users which can include Sales, Marketing, Service, Finance, and the Executive team. With Duet360, the front office and the back office are transformed into one office.

"I went back to Rob Hienekamp (Endowance CEO) to reengage, hoping Endowance could turn things around. It didn't hurt that the Salesforce Sales Management Team recommended Endowance as the trusted go-to integration partner to connect Salesforce to Infor ERPs."

Endowance's business consulting approach quickly reviewed the requirements and after gaining design approval, the team successfully deployed an integrated solution with the capability the GK executive team had lacked before; near-real-time access to information that included sales opportunities, quotes, sales orders, shipping and invoicing, and receivables, and more. All of this information is available on demand.

"We literally have access to any information in Syteline. It forms a more complete customer profile

in Salesforce not only in the Sales Pipeline but also for the After-market Component Sales business. This wasn't possible before we implemented Duet360 Enterprise. The integration was a game changer," stated Egan. "Visibility of our global business was now possible without the time-consuming effort of gathering the information first and then analyzing. We could see what opportunities each sales executive was working around the world." Global sales information enriched with ERP data through the Duet360 integration, has enabled faster decision making to be competitive while providing an outstanding customer experience.

Driving Marketing and Partner Relationships with Duet360

Following the successful deployment of the integration between Salesforce and Syteline, Egan was also given responsibility for Marketing. "We needed to have better alignment and lead management with our sales teams. Pardot had been deployed but with an assist from Endowance and Duet360, the integration solution enhanced our ability to nurture leads and automate the process of maintaining contact with customers and prospects ". Now the sales and marketing team can easily review marketing campaign results and reinvest in the successful programs. End-to-end, measuring the effectiveness of these campaigns was possible by tracking lead generation to sales won.

With the Pardot-Salesforce integration working efficiently, Egan turned to fixing Partner Community. The GK network of Manufacturing Reps was trained on the tool, but the user experience was less than optimal. Following the Duet360 integration, the accuracy of the information improved significantly. Leads were distributed to the right representative. The sales cycle could be followed easily, and deal sizes were clear and added to the sales pipeline. The capability to manage this channel effectively is a strong contributor to GK's growth plan.

Before Duet360, one person was dedicated to reporting and working through the matrix of tools and information sources. Now with Duet360, that information is available in near-real-time on a global level in Salesforce. That person is now adding value in new and productive ways. "We have a great relationship with Endowance as indicated by the fact we continue to work with the team on more enhancements. Our business continues to grow at a 12% year-to-year. I don't think that would have been possible without the success of our integration project with Endowance."