

Daikin Applied (UK) leverages Salesforce to Trailblaze a Genuine Customer Journey



Company Daikin Applied (UK) Ltd.

Industry Manufacturing

Background

Daikin Applied (UK) Ltd is the market leading designer and manufacturer of technologically-advanced and energy-efficient commercial HVAC systems. From office buildings to data centres, hospitals and manufacturing plants, Daikin Applied Chillers and Air-Handling Units keep people and equipment at the right temperature. Daikin Applied (UK) Ltd is part of a global corporation with over 90 production bases and products sold in 150 countries.

The Daikin Applied Challenge

Daikin Applied (UK) had previously invested in Salesforce, but executives were not seeing the benefits. C-suite executives were beginning to doubt whether Salesforce was an effective solution altogether. **Daikin Applied (UK) was still using spreadsheets for manual analytics.** Specifically, the firm's original implementation plan had some shortcomings.

- **Poor User Adoption** – People and teams weren't using Salesforce to its full potential.
- **Weak Reporting** – The company still used spreadsheets to create manual reports, so reporting, analytics and forecasting was weak and the company couldn't generate meaningful insights for future planning and decision-making.
- **Disconnected Sales Process** – Daikin Applied (UK) was not driving an end-to-end sales journey - from lead generation through to customer service, they lacked an effective overall process.

The Missing Piece – An Effective Implementation Partner

The company's Salesforce struggles began with its original implementation partner which left the company with:

- A data model that needed complete reconfiguration
- Manual processes and spreadsheets for analytics
- No plan for ensuring user adoption or supporting a dedicated in-house Admin

The Daikin Applied (UK) leadership team knew Salesforce has real potential and there had to be a better way.

Stakeholder Collaboration – The Daikin Applied Team

A broad organisation like Daikin Applied (UK) has stakeholders across its C-suite, sales, operations, and finance, technology and customer service teams. Managing Director Clive Parkman recognised the complexity of the task Daikin Applied (UK) faced to get their Salesforce in order, appointing a team consisting of:

- Project lead responsible for objectives, budget and stakeholder coordination – John McCarthy
- Dedicated Salesforce Admin – Lewis Howel, and
- Marketing manager – Nikita Patel, to ensure Brand consistency across the organisation.

The Managing Director astutely recognised strong stakeholder collaboration was going to be a crucial factor in the overall success of their upcoming project and thus the organisation was primed to begin their major transformational journey.

“With Salesforce, we can make the most of every opportunity. We can understand our customers and the market, and provide an end-to-end experience that differentiates us as a business.”

– John McCarthy
National After-Sales & CRM Manager
Daikin Applied (UK) Ltd.

The Salesforce Solution

Ceterna and Salesforce developed a comprehensive plan to put Daikin Applied (UK) in the driver's seat – unveiling a roadmap, tools and best practices for end-to-end automated services while maintaining business cadence.

In the Daikin Applied (UK) project, Ceterna empowered the company's in-house admins to harness Salesforce's full potential. Specifically, the Ceterna roadmap focused on implementing two key Salesforce features: Sales Cloud and Configure-Price-Quote (CPQ).

Salesforce Sales Cloud was designed to integrate every step of the sales process, right from lead generation through to customer service. In Daikin Applied (UK's) project, Ceterna customised Sales Cloud to deliver immediate benefits through:

- Streamlined approvals
- More accurate forecasting
- Better customer data

Salesforce CPQ is a tool for closing deals faster while freeing up people's time to focus on customer accounts. Salesforce CPQ has already successfully helped Daikin Applied (UK) to handle their 250,000+ pricing rules and:

- Build easy and accurate quotes
- Create faster and cleaner proposals and contracts
- Streamline billing and revenue-handling

Lessons Learned

The Daikin Applied (UK) project reiterates that success depends on some key fundamentals:

- Engaged and strong leadership
- High quality internal admin skills
- A dependable and experienced implementation partner

The Ceterna Difference

Daikin Applied (UK) needed the right partner to show them the way.

Recognising Ceterna's innovative approach and extensive manufacturing experience, Daikin Applied (UK) immediately chose Ceterna as a trusted partner. Ceterna's implementation service successfully achieved:

- Unique, customised solution that aligned with Daikin Applied (UK) business cadence
- Daikin Applied (UK) admins now manage the CPQ functionality in-house
- Sales reps now have the power to generate quotes and proposals at the click of a button
- Customer-facing reps have greater mobility, using their mobile devices for quotes, pricing and contracts