

SUCCESS STORY



Automotive Industry | Microsoft Dynamics 365 Cloud | ZF Friedrichshafen AG



Customer Engagement by Microsoft: ZF digitizes processes in sales and service

The ZF company is digitizing and harmonizing its processes in sales and service using a cloud platform based on Microsoft Dynamics, which centrally manages customer-related data in a high quality way. The 360-degree vision that this produces results in even more efficient management of the operative customer business, and at the same time, improves cooperation with customers and partners along with internal cooperation. Expansion into a comprehensive communication and collaboration platform is planned. ORBIS AG is the consulting and implementation partner for this long-term digitization program.



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ZF is an internationally operating technology group, supplying systems for the mobility of automobiles, commercial vehicles and industrial technology. ZF makes vehicles see, think and act: In the four technology fields of Vehicle Motion Control, Integrated Safety, Automated Driving and Electromobility, ZF offers comprehensive solutions for established vehicle manufacturers as well as for emerging providers of transportation and mobility services. ZF electrifies vehicles in a wide range of categories, and using its products, contributes toward reducing emissions and protecting the climate.

ZF Friedrichshafen AG

Headquarter: Friedrichshafen

Field: Automotive Industry

Products: driveline and chassis technology for cars and commercial vehicles along with specialist plant equipment such as construction equipment

Number of locations: 271 locations in 42 countries

Number of employees: > 150.000

<https://www.zf.com/>

The group owes its economic success to the development and manufacture of high-quality, innovative products, along with an effective supply chain and excellent services. Using the "Next Generation Mobility" strategy, ZF has set the course for the future. An important milestone here includes the digital company transformation with digital products and services, production in line with the concept of Industry 4.0 and the digitization of company processes in all ten divisions.

Single Point of Truth and 360-degree

In service, sales and marketing, the company is applying cloud-based customer engagement solutions with Microsoft Dynamics as a foundation. Sales and service-related information across teams, subject and business areas along with locations are uniformly merged in the Microsoft Cloud – keyword Single Point of Truth –, networked and structured, and then administered in high quality. Bidirectional real-time integration with a range of SAP systems allows automatic data exchange between Microsoft and SAP software. The customer platform is then optimally expanded with a Microsoft-based web portal, through which the ZF Aftermarket Division links external partners along with certified workshops and traders into the service processes.

"All this lays the foundation for a 360-degree view and allows us to harmonize the customer-related processes and manage even more efficiently, and to improve cooperation both with customers and partners and internally," says Markus Witzorky, IT Architecture & Digital Product Service Manager at ZF. In sales, all ZF divisions as well as the central market and sales staff work with the customer data platform based on Microsoft Dynamics, while in service, initially only the largest national organizations of the Aftermarket Division. Rollouts in other countries have taken place or are planned.

Clear view on activities and opportunities

The approximately 2800 final users in sales and service benefit from the standardized, IT-led processes to a great extent. The sales employees were now able to access the data in accordance with their role and authorizations at any time of the day, meaning they are always up to date when it comes to activities, sales opportunities and projects. This has a positive impact on the quality of customer discussions and also simplifies and improves internal communication via teams, across business areas and locations.

"There is a clear added value here, along with the fact that the creation, monitoring and tracking of quotations requested by a customer in the course of a Request for Quotation (RFQ) is supported consistently," clarifies Angelika Schlicht, IT Market – Core Applications Manager at ZF. Among other things, information from development and design as well as economic efficiency calculations are included in the offers. Comprehensive reporting based on Microsoft Power BI complements the RFQ process - with Customer Quotation Intelligence (CQI) as a keyword.

Simplified complaints processing

Service processes are also now able to be handled more efficiently: Complaints and warranty claims are processed through the online portal in conjunction with external partners. Registered partners along with workshops or spare parts dealers – of whom there are around 28,000 worldwide – gain access via the portal to the relevant online services.

An example: If a problem occurs with a ZF automatic transmission, the driver can search for a certified workshop near them on the ZF Aftermarket website. If it is established that a claim for free repairs exists, the workshop opens a support case in the portal, recording working time with an hourly rate along with expenses for spare parts on a service ticket. The information from the service ticket flows into the Microsoft Dynamics customer service solution, in which the costs for reimbursement to the workshop are determined. The result is transferred



to the SAP Back-End, where a comparison of the hourly rates with the deposited conditions takes place and the payment is initiated. In addition, the availability of the spare parts requested via the online portal or the appropriate replacement gearbox is checked in real time in SAP.

ORBIS on board from the beginning

"When it comes to digitization, standardization and optimization of the service and sales process, it's all about an ambitious, long-term program that we are implementing step by step," explains Markus Witzorky. For this purpose, ZF relied on the support of ORBIS AG as a consulting and implementation partner from the very start. The Saarbrücken-based IT service provider holds the relevant expertise when it comes to customer processes, the implementation of Microsoft Dynamics solutions and their integration with SAP software with the Middleware SAP Process Orchestration and the ORBIS Connector. In addition, it has successfully implemented multiple projects in the SAP environment for ZF.

"With ORBIS, we have a partner at our side that brings all the services together from process analysis and consultation all the way to implementing all services, which is experienced when it comes to applications and processes, and with whom we can work in confidence and on an equal basis. The ORBIS team refers us promptly to new topics and technologies in the Microsoft environment that promise tangible benefits," adds Markus Witzorky, Manager IT Architecture & Digital Product Service (FIMM2) IT Market & Analytics.

From on-premises to the Cloud

The first step was the introduction of the on-premises solution Microsoft Dynamics CRM in 2015. It replaced legacy CRM systems and a large quantity of isolated applications that were insufficiently integrated with the SAP systems, together with several individual applications and person-dependent processes that had grown over the years. Microsoft Dynamics CRM was not only the ideal solution for fulfilling the requirements when it came to flexibility and future-proofing, it also performed well when it came to data governance and the option of cloud operation. This was preceded by an intensive market evaluation, at the end of which a shortlist of CRM systems in question was drawn up. The final decision was made against the legacy applications following a fit-gap analysis.

In 2018, migration to Microsoft Dynamics 365 Cloud (Sales and Customer Service) took place. "The main reason for the changeover was the fact that Microsoft initially prepares new functions in the Cloud, some of which are actually developed for the Cloud only," explains Markus Witzorky. The lower costs compared with operation in the company's own data center and the integration of Microsoft Dynamics 365 with the Office 365 previously introduced at ZF also played a role.

The Power BI analysis platform, which was implemented in the course of the migration to the cloud, allows meaningful analyses that provide those responsible all the way up to the CEO with clearly-visualized glimpses into customer insights and an overview of additional optimization and synergy potential. Depending on requirements, Power BI will be adapted to new analysis requirements.

Expansion to an omni-channel platform

Markus Witzorky says *"We have achieved a great deal and designed the sales and service processes to be more efficient and transparent thanks to integrated IT-supported processes. We will therefore continue along this path."* Sub-projects such as an online assessment for auditing ZF partners and service points or displaying information on workshops from the CRM in an online map service so that they can be found quickly through the ZF website have already been initiated. In addition, expansion to a comprehensive communication and collaboration platform is planned - with omni-channel technologies (bots and chatbots), apps and workflows of the Power Platform, the integration of Microsoft Teams along with the Microsoft Dynamics 365 field service function.



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More Information



<https://www.orbis.de/en/microsoft-consulting/dynamics-365-service/>

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