Global equipment supplier uses Colligo Email Manager to inform responsive sales outreach

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Introduction

For any business selling equipment or materials for large global projects, winning sales depends on completely capturing customers' complex needs and specifications, including the dozens or hundreds of discovery conversations that lead to the initial sales proposal, and through to the final purchase agreement. Missteps in understanding the specific needs of a buyer can cost the entire sale.

For a global supplier of equipment solutions for the oil, gas, petrochemical, power and process industries, competing for and winning new business demanded a skilled and responsive sales effort to both accurately diagnose the needs of customers, and work as an integrated team to propose complex major equipment sales and refine the pitches to final agreements.

Over the lifecycle of every buyer relationship, purchase requirements are captured across many email conversations sometimes with different customer stakeholders and by different employees of the manufacturer. Historically, the sales team captured emails about customers' evolving needs, and the commitments being made by the sales team into Outlook public folders. Sales reps across the energy division could

all access the shared folders to hunt for information. But with Microsoft limiting support of public folders on older infrastructure like theirs, the global equipment supplier recognized the need to draw upon Microsoft's more progressive content services capabilities to save and share emails across their sales team.

With Microsoft SharePoint 2013 in place on premise, and with more than 6,000 users interacting with the system each month, the company wanted to utilize this core infrastructure as a backbone for their knowledge management. At the same time, the business recognized the behaviour of their sales team, which had an entrenched habit of capturing project knowledge from within Microsoft Outlook. Even though the sales team recognized their existing approach to save emails and attachments on shared public folders didn't provide the search speed or accuracy to effectively help them to build and refine bids as quickly as they wanted, the team was loyal to its old habit of saving emails to public Outlook folders. The company needed to find a new method of email management that gave the same save-and-share-from-Outlook convenience with new search effectiveness and on a sound knowledge management infrastructure.

SUMMARY

CHALLENGE

- Storing email in Outlook public folders was not a long-term solution with Microsoft phasing out support.

- Searching public folders in Outlook was not fast enough to support sales team efficiency.

- The company sought to put in place a knowledge capture and email management approach that better utilized Microsoft modern capabilities.

SOLUTION

- Enabled faster search of complete sales information captured by email and in attachments utilizing SharePoint and useful classification and metadata.

- Left in place existing sales team behaviour of saving emails and attachments from Outlook by bringing SharePoint access into Outlook.

RESULTS

- Faster search helps the sales team more rapidly find information to support timely proposals, quickly respond to evolving customer requests, and efficiently close sales.

- Customer knowledge is completely captured and protected in a modern way that best utilizes the company's investment in SharePoint infrastructure.

Challenge

While the global equipment supplier had SharePoint in place prior to implementing Colligo for email management, their sales team was not using it, preferring to save emails and attachments to public shared folders in Outlook. The sales team saw saving emails to SharePoint as too time consuming and inconvenient when their day-to-day work was focused on managing emails within Outlook.

The company had set a goal to better utilize SharePoint to store knowledge for cross-team and cross-division collaboration. The IT team was challenged to find a way to make using SharePoint more convenient for the sales team and overcome the current challenges:

Emails not tagged, hard to find searching through public folders. With hundreds of sales conversations being captured as emails in public folders over

months or years, Outlook search struggled to uncover critical information without metadata in place. Over a sales cycle, sales reps could spend hours mining for critical project knowledge, with the risk that valuable sales bid details could be overlooked.

Public folders grew large, difficult to manage. Not only was searching difficult in ever-growing public folders, the IT effort needed to support extremely large public folders was demanding and costly.

SharePoint capabilities weren't being fully utilized. With SharePoint in use mainly by the Operations team, the global equipment manufacturer recognized that it wasn't effectively drawing upon SharePoint's capabilities to efficiently capture and classify content for collaboration.

"Each member of the sales team gets tons of emails from sales prospects, and each rep is the owner of the relationship with their contacts. Talking with sales users, they needed a way to easily share emails with each other across a sales group to ensure everyone was continuously aware of what was discussed, committed and promised. The team was used to the drag and drop ease of saving emails into a public folder. They wanted to hang onto that approach and find a way to get knowledge captured into SharePoint."

IT Business Analyst

Solution

The company needed to get the sales team drawing upon SharePoint's capabilities to collect content and make it easy to search for and share, all while ensuring security, scalability and a pathway to information compliance. The sales team wanted to continue to work as they were in Outlook. The IT team needed to find a way to bring the two worlds together and began evaluation email management solutions for SharePoint.

To support the Colligo rollout, the company's IT team worked with members of the sales team to set up libraries and a simple logical structure to classify emails saved. Colligo makes applying the classifications and adding metadata easy from Outlook.

Familiar email capture. By integrating SharePoint folder access directly into Outlook using Colligo Email Manager, the sales team could continue to work as it did, dragging and dropping emails and directly to SharePoint from their Outlook inboxes. In just a couple of clicks, sales reps can save site proposals, pricing information and draft contracts to the relevant library in SharePoint, with Colligo automatically storing key fields like subject, sender and date as metadata.

Faster search and sharing capabilities. Anyone on the sales team can now rapidly search for, find and share secure links to essential sales information as emails and attachments are captured and tagged with useful metadata. Faster, certain discovery of sales information, helps the sales team put forward the most competitive and customer-relevant sales proposals, in the fastest time possible.

Scalable and secure knowledge management. With sales team knowledge now being captured and classified in SharePoint, the global equipment supplier now has multiple departments finding benefit from easier-to-find information in SharePoint. As its users shift, the company is capturing more content into SharePoint, gaining more benefit from the scalable and secure knowledge management platform.

"Colligo gave our company and our sales team what they each wanted – drag and drop ease of saving emails and better utilization of SharePoint. Now sales reps just save to SharePoint from their inboxes and add metadata for faster search. How Colligo works is familiar for our sales team, so they didn't need training and usage of SharePoint has gone up."

IT Solution Architect

Results

Colligo has now been in use for two years by the company's sales team, streamlining the capture of emails, attachments and documents into SharePoint. Providing drag and drop Outlook email management integrated into SharePoint provides the sales team with the information access and speed they require to best compete in the globally-competitive equipment marketplace, while putting the company on a modern, secure and scalable knowledge management footing.

Shared sale awareness secures customer wins. Improved search speed and better search results provide the sales team with complete and timely access to information on evolving site proposals, contracts and pricing required to earn and maintain winning customer relationships.

Familiar functionality allows for rapid adoption. The sales team at the equipment supplier wanted what most users want: better, faster access to information without changing how they already work. Colligo Email Manager provided familiar drag and drop sharing functionality in Outlook but provided SharePoint integration. No behaviour change or training was required.

Expanding SharePoint demonstrates progressive knowledge management. The company began working with Colligo with an ambition to evolve its knowledge management to a more progressive, scalable approach. With SharePoint adoption extending beyond its operations team into its sales department, the organization has established momentum towards progressive knowledge management.

"Colligo helped us serve the needs of both people capturing emails and the people with whom those emails are being shared. The sales team now know how to save and categorize emails at a high level, and do tagging effectively with metadata. This is a modern and scalable approach to knowledge management, far better than old habits of layers and layers folders. And for people accessing those shared emails – now it's easy to find what they seek with search that can draw upon metadata for fast, relevant search results."

IT Solution Architect

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Colligo supports intelligent knowledge management and compliance on SharePoint and Office 365 – all designed for users. Our complete email and document management solution helps organizations with diverse Microsoft environments to improve productivity and make data compliance practical. Colligo is a Microsoft Silver Application Development Partner and is proud to serve mid-sized organizations, Global 500 customers, and respected SharePoint and records management partners. www.colligo.com