Informatica | ergotron®

Taking a Stand:

Ergotron Helps Customers Rethink Workspaces by Transforming Customer Service

" Using Informatica to synchronize customer inquiry data helps us improve response times, minimize chances of lost requests, and scale support. Our customers feel the benefits."

Damon Metts
Director, IT Program Management
Ergotron

Goals	Solution	Results
Provide customer facing professionals with access to complete customer order history without storing redundant data	Informatica Intelligent Cloud Data Integration synchronizes batch data between Salesforce Service Cloud & Oracle E-Business Suite ERP system	Helps drive sales of ergonomic products and retain customers
Save time and reduce complexity for sales and customer service, while scaling customer support across multiple regions and departments	With customer and product data accessible from Salesforce, sales agents have the information to serve customers at their fingertips	Improves customer resolution times (up to 50% faster), minimizes lost customer requests, and keeps support quality high as company grows
Improve customer service by providing agents with faster access to reliable product data	Informatica Cloud Application Integration provides real-time data on product availability and customer orders	Strengthens Ergotron reputation by answering customers' questions in real time, reducing customer call-backs and order fulfillment time

Business Requirements:

- Identify a single-vendor solution that would integrate with existing Salesforce and Oracle solutions

- Reduce cycle times to get ergonomic products to customers

- Leverage expert assistance to maximize development resources for fast time to value

About Ergotron
Ergotron delivers adjustable and innovative technology furniture and mounts that promote healthier, more productive environments for life and work.

Since 1982, Ergotron innovations have improved human interfaces with digital displays, delivering better ergonomics to consumers as well as workers in healthcare, education, and offices. The company's history of product innovation includes more than 200 patents and a unique portfolio of industry-recognized brands. From stand-up desks and display mounts to charging systems, mobile carts, and accessories, Ergotron products help people around the world adopt healthier workstyles.
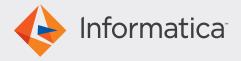
Over the years, Ergotron expanded the number of markets, customers, partners, and sales channels that it serves in the United States, Europe, and Asia. As the company grew in size and complexity, new business processes evolved organically to handle more sophisticated services and responses to customers.

The nature of Ergotron's business means that as its sales agents speak to prospective buyers and customer service representatives address the concerns of customers, they need to have quick and reliable access to accurate product information to determine the best solution for each customer. Sometimes sales agents and service representatives would access the information needed to serve customers in the company's Oracle E-Business ERP system; other times, they had to look in Salesforce Service Cloud.

Too often, sales agents or customer service representatives needed to disengage with a customer during a call to locate required information, such as customer purchasing history, product names and specifications, or recommended usage guidelines. By the time they called the customer back, there was a good chance the customer had already switched sales channels and moved on.

To maximize sales opportunities and keep customer service levels high, Ergotron needed to bring these processes into Salesforce to help ensure that sales agents and customer service representatives have the data they need at their fingertips to quickly provide prospects and customers with necessary product details. However, the company wanted to avoid the cost and complexity of storing redundant data in multiple systems, including order, account, product, and inventory information from the ERP system, as well as the status of various suppliers.
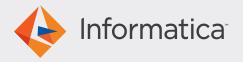
"Our customers want easy access to fast service; they expect to interact with sales agents and customer service representatives who know their history based on previous interactions," says Damon Metts, Director, IT Program Management, Ergotron. "To accelerate customer interaction with sales agents and service representatives, we needed to reduce the complexity of our own operations. We wanted to up-level the customer experience by minimizing the wait times for customers to receive critical sales or service information from our sales agents and representatives."

Informatica

Simplifying data and application integration

Ergotron decided to begin a new Salesforce implementation and use Informatica Cloud Data Integration to connect to the ERP system and deliver the information that sales agents and customer service representatives need to quickly satisfy a customer request from within Salesforce. In addition to batch synchronization between Salesforce and Oracle, Ergotron needed to combine real-time CRM and ERP data for customer orders and product available-to-promise (ATP) information, such as available quantities and delivery due dates.

Ergotron considered integration products from Informatica as well as competing solutions. It also considered building its own custom web service for real-time data integration, which would have required substantial up-front costs as well as ongoing maintenance. The company chose Informatica Cloud Data Integration for batch data synchronization and Informatica Cloud Application Integration for real-time integration.

"Informatica offered us a subscription service for both real-time and batch processing, with a single portal that allows us to consolidate our skill sets," says Metts. "Informatica is easy to use and has been able to handle everything we've thrown at it. Also, the native JSON capability in Informatica made it easier for us to work integration into Salesforce."

To achieve fast time to value, Ergotron used Informatica Process Designer to create flexible business process rules for handling different real-time scenarios and build service connectors using a simple form. For example, looking up manufacturing job numbers allowed for immediate information to be utilized by customer care agents when the part was not serialized but was traceable to a build date, location, and bill of materials. It also referenced online tutorials from Informatica University Success Academy and used the Informatica Application Integration Success Pack to get hands-on assistance from experts.

"Informatica gives us a single flow that helps us reduce our cycle times for testing and bring data integrations into production much faster," says Metts. "Once we had all of the business rules defined and objects identified, coding and building the connectors took minutes. The expert guidance we received as part of the Informatica Application Integration Success Pack made a big difference, taking us from zero to immediate productive time."

Improving the customer service experience

Now, when customers call asking about product availability, warranty service, or replacement parts, sales agents and customer service representatives can answer all their questions using information from within Salesforce. Because accounts, sales history, addresses, and other ERP data is synchronized within Salesforce, Ergotron can begin to process replacement parts, returns, warranty labor, and other orders right away, with real-time ATP and immediate order fulfillment. Service item response times have improved by up to 50% in cases where ERP part numbers were required to fulfill orders.

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Inside The Solution:

- Informatica Cloud Data Integration

- Informatica Cloud Application Integration

Once executed in the ERP system, transactions are synchronized back to Salesforce for updates on status and closure. All data is captured in a Salesforce Customer Case where it is used for additional processing, allowing Ergotron to better measure the management of internal and external customer interactions through comprehensive reporting available on demand, in real time. As a result, salespeople can be more effective, and customer satisfaction increases along with their brand loyalty.
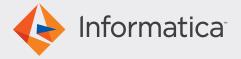
For example, if a customer moves to a new office and loses the hex bolts and washers on their LX Dual Side-by-Side Arm, Ergotron can call on the ERP system to immediately access the bill of material for that unique product build, including the exact parts used, date built, and the plant in which it was built. All of this is accomplished in real time without storing redundant data, saving data governance and maintenance costs. The sales agent can stay on the phone, answer the customer's questions, put the orders in, and provide confirmation numbers from the ERP system immediately.

"Using Informatica to synchronize customer inquiry data helps us improve response times, minimize lost requests, and scale support across multiple departments," says Metts. "Our customers feel the benefits as they interact with our sales and support teams and see that we have knowledge of their history with Ergotron."

A new standard for success

Pleased to have Informatica as its new standard for batch and real-time data integration, Ergotron plans to evaluate Informatica B2B Data Exchange in the near future to process electronic data interchange (EDI) transactions. This initiative will be made easier thanks to the Informatica Intelligent Data Platform which will allows organizations to grow and evolve at their own speed by adding data management capabilities on a modular basis.

"Informatica has a comprehensive product family with many powerful solutions that we can grow into," says Metts. "Fortunately, the subscription-based pricing model gives us the flexibility to experiment. I have found the Informatica team to be very interested in our success, always educating us about the services and features that will work best for our business."