Gabrielli S.p.A. empowers sales teams with mobile synchronization between IBM (Lotus) Notes and Sugar

Gabrielli S.p.A. founded 1954 in Cittadella, Italy, processes and markets steel products ranging from steel sheets that are obtained from hot rolled coils and heavy plates, to steel long products that are made for several uses such as building parts for industrial vehicles, earth-moving vehicles, the automotive industry, containers, railway carriages, ship building, and industrial lifting devices. Gabrielli's steel elements are also used for agricultural machinery and road and railway bridges and viaducts, among others. Gabrielli group consists of 7 companies located in Italy and employs around 1,200 people.

Overview

Gabrielli S.p.A. now has three Divisions, namely: Coils Division, Heavy Plates Division and Long Products Division. Across these three divisions, Gabrielli S.p.A. has reached a strong volume capacity of about 400,000 tons per year, coming from the main national and international steel works, with different qualities and for several uses. The company has a large sales staff that rely on their handheld devices to work more efficiently, however, there were major pain areas associated with the fact that they could not access their CRM data on their mobile devices.

The Challenge

Gabrielli's sales staff spends most of their time in the field and rely heavily on their mobile devices for internal and external communications. In order to best serve their existing and prospective customers, Gabrielli's sales representatives require access to product features, pricing, inventory, customer offers, and appointment data. They also need insights into the customer relationship lifecycle, customer sales opportunities, and price offers. This data is stored in the CRM system internally. Gabrielli uses Sugar to storing their customer data and IBM (Lotus) Notes for their e-mail communications.

In order to sync data, Gabrielli strated out by using the IBM Lotus Notes plug-in for Sugar. This was time consuming as the plug-in had to be installed and maintained on every device. One big disadvantage was that the plug-in did not support mobile sync. Since Gabrielli's sales staff work in the field, they were forced to call and e-mail Gabrielli's back office staff to access important data customer data. The challenge they faced was that most of this data was updated either in the office after the customer meetings had taken place or the customer data was stored locally and "forgotten" on sales people's devices. As a result, the critical data stored in their CRM did not get updated and synced.

Gabrielli realized that the critical customer data being stored and updated into these systems had to be synced on a continuous basis, close to real-time, independent of device, available at all times, to all parties, internal and external and across all platforms used. Gabrielli needed a solution to improve the data communication and storage process and to make sure the field sales staff always has access to the most accurate customer, product, and pricing information regardless of whether they were working in the office or in the field. To make this a reality, Gabrielli researched different solutions in the market.

The Solution

Gabrielli's CRM partner OpenSymbol, a leading CRM consultant company in Italy selling Salesforce and Sugar, recommended Riva CRM server-side sync. Riva On-Premise was tested and Gabrielli received excellent support from the Riva technical team in setting up the software and in the configuration as per their requirements. After successfully testing Riva On-Premise, Gabrielli chose to implement the Riva solution. Because Riva seamlessly and realiably synchronizes on the server side, critical data in the Sugar and IBM Lotus Notes was now *always* in sync.

Riva syncs Sugar contacts, leads, contact notes, calendar events, tasks, opportunities, cases, and projects. Plus, Riva delivers advanced integration and interoperability features to drive CRM adoption and increase sales.

For example, Riva delivers advanced email integration features, email-to-opportunity and email-to-case conversion, support for custom fields and custom objects, and the ability to auto-create contacts in the TO: and CC: fields of emails that aren't already listed in Sugar. Riva also provides advanced integration and filtering rules for email attachments.

With Riva, it is irrelevant which device, operating system, or platform is used. If a sales person writes meeting notes to the corresponding Lotus Notes calendar appointment or customer specific e-mail, these notes are synced real-time (sync cycles are flexible, a company can choose to sync anywhere from one minute up to an hour) to the CRM system so that others within the organization have access to it. The same applies to e-mails. Whether they are in the office or in the field, if a member of the sales staff needs access to the most up-to-date pricing or product information that is stored in the CRM system, they are now able to access and read it with their smartphone directly in IBM Lotus Notes without ever having to open Sugar. Accessing and reading opportunity information stored in Sugar via IBM Lotus Notes also works offline!

The Results

By transparently integrating the data between IBM Lotus Notes and Sugar, Gabrielli found a way to make the internal and external communication process remarkably more efficient. This meant savings in time and money. Now Gabrielli's sales people working in the field do not have to contact the back office staff for important information – they now have instant access to the most up-to-date customer, product, and pricing information. The data between the two systems is now being updated automatically and in a timely fashion via the invisible server-side sync. Customer specific e-mails including meeting notes, and items including attachments are smart converted and archived to the CRM for real-time access available to everyone in the company. For Gabrielli, one of the greatest value-adds is the ability to access and modify customer and customer opportunity data directly within their e-mail interface, on personal mobile devices, and independent of location.

"We are very happy that Riva was recommended to us by our partner OpenSymbol. Time, and consequently money, has been saved. Traveling sales agents using Sugar and IBM Lotus Notes no longer have to call the back office staff for up-to-date insights into our customers. The Riva On-Premise deployment was very easy, we were offered a lot of flexible deployment options, and received very good support from the Riva engineers. Riva is very stable, the support staff is responsible and skilled at answering any questions we have. We are really looking forward to the development of Riva Insight for IBM Lotus Domino since this additional feature would be of great value to us," commented Matteo Briotto, IT Director of Gabrielli.