



# SALES EMPOWERMENT FOR PROCESS MANUFACTURERS

Aptean Sales for Process Manufacturing is the only out-of-the-box CRM solution designed to deliver full Ross ERP client data and price and quote capabilities directly to the salesperson

WHITEPAPER

## **BEST-IN-CLASS**

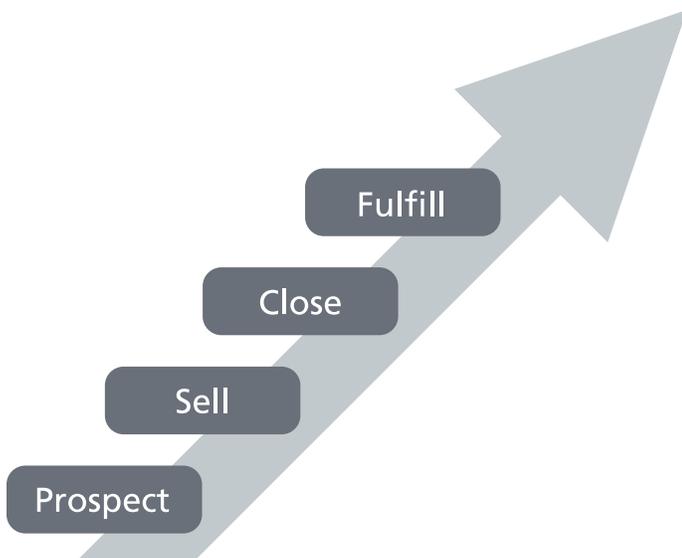
Best-in-class manufacturers demand best-in-class sales teams...sales teams powered by insight and understanding of their client's activity whether in the office or on the road. Aptean Sales for Process Manufacturing delivers a 360-degree view of customers, seamlessly linked to Ross ERP that outperforms generic sales solutions. This provides a tailored integration that comes fully featured and designed specifically for process manufacturing sales teams.

A 360-degree view can only be achieved through the tight integration of ERP and CRM. When salespeople have to jump through hoops to find a delivery report, call the home office for pricing or wait for an email reply when a customer asks about a shipment, they risk falling behind the competitive curve and credibility suffers. Integrated solutions help resolve these issues. A Mint Jutras 2014 ERP solution study found that those companies with world class ERP implementations were 40% more likely to tightly integrate CRM capabilities, which also help reduce cycle times and increase production output, both by 17%<sup>1</sup>. But, most importantly to the sales team, these same world class implementations improved customer retention by 23%. Making it easier to sell is valuable, keeping the customers you have – priceless.

<sup>1</sup> Mint Jutras. "ERP Solution Study". Subscription publication, November 2014.

# SALES FOR PROCESS MANUFACTURING WORKFLOW

Aptean Sales for Process Manufacturing supports multiple aspects of sales and marketing automation tightly integrated with data from the Ross system. This “prospect to cash” workflow allows the sales team to work in a single system while moving through the sales and product delivery cycle. By leveraging Ross’s powerful pricing technology, salespeople can prepare proposals and execute sales orders that include complex pricing and discounting rules. And because Aptean Sales for Process Manufacturing is totally integrated with Microsoft Office, they can issue the proposal from directly within their systems.



A process manufacturer’s sales team knows that client satisfaction is core to sales success and that being able to provide the right answer to client questions quickly and accurately is the key to customer satisfaction. Process manufacturers who are striving to achieve above-average growth in an expanding market face tough competition and customers that demand higher levels of product quality and delivery - along with the highest level of customer service. Aptean’s Ross ERP solution allows manufacturers to leverage a market-leading planning tool for delivering the best product, but manufacturers often lack an equivalent tool for client sales and service. Aptean Sales for Process Manufacturing gives sales teams the tools that they need to exceed their client’s expectations for customer service and manage the customer relationship.



Since Aptean Sales for Process Manufacturing is a single-product, single-vendor solution, it doesn’t require expensive custom-written connectors to bolt together separate technologies. All product upgrades and patches are fully certified to work out of the box. All customer service is handled by Aptean’s support team with deep experience in working with both solutions. Aptean Sales for Process Manufacturing offers flexibility in deployment and can be installed on-premise or as a cloud-based system with simple, flexible SaaS licensing.

## AN INTEGRATED SALES TOOL FOR CONNECTED SALES ORGANIZATIONS

By implementing a robust, bi-directional integration Aptean Sales for Process Manufacturing provides a two-way data flow between the field and the home office, loading manufacturing, shipping and financial data directly into the salesperson’s pipeline dashboard with win/loss tracking capability. Providing a single view of the client, a single view of the product and a single view of the price, Aptean Sales for Process Manufacturing keeps the entire organization in sync through configurable, flexible and filterable connections.

## AN INTEGRATED SALES TOOL FOR EVOLVING SALES ORGANIZATIONS

The reality of today’s business model means that systems designed around one product line or one factory are no longer relevant. Order status and production information has to be consolidated from multiple production facilities and needs to be aware of complex supply chains that can impact the client’s delivery schedule. Increasing production efficiency means shrinking floor inventory which makes accurate insights into delivery timelines even more critical.

Modern sales forces need Apteian Sales for Process Manufacturing’s power to provide insight into credit and billing issues – even when financials are consolidated in a parent organization and each manufacturing entity sits as a separate division. By linking natively to ERP and financials, Apteian Sales for Process Manufacturing provides accurate and up to date financial information that hybrid systems – which require off-line data loading – simply can’t match. By breaking down company silos and bringing factory information to the field, the sales team’s activities become tightly integrated with production.

Integrated quoting and ordering capabilities provides historical data and empowers cross-sell and upsell opportunities:

- Pricing plus advanced features like costing simulations and data on the customer’s credit balance, credit review dates, their credit = warning limit, order abort limit and price overrides
- Easy order lookup
- Discounts
- Broker and sales commissions
- Pricing and promotions management on invoice discounts included
- Extended price on proposal synchronized to extended price on Ross sales order
- Multiple units of measure and part codes on quote including potency and catchweight

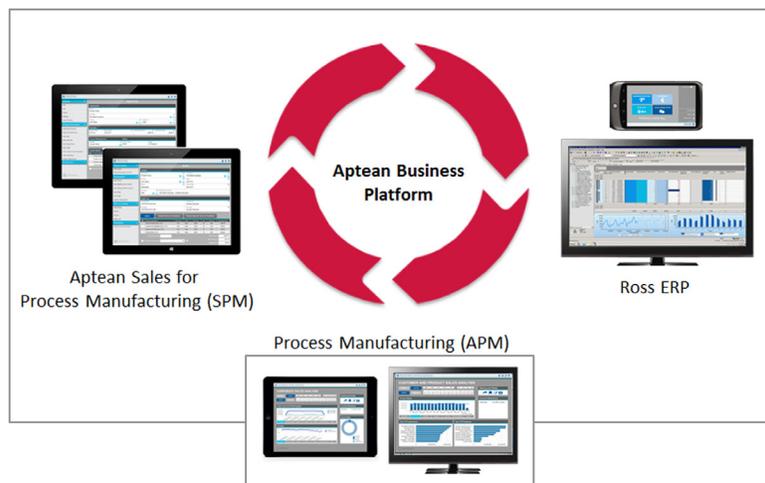
## AN INTEGRATED SALES TOOL FOR SATISFYING DEMANDING CLIENTS

Industries that serve clients with high precision, high quality and traceability requirements must be able to answer questions that arise during sales calls and when clients need to understand the when, what and where. Apteian SPM for Ross ERP provides the information pass-through that allows the sales force to address these reporting needs. Available, high quality data satisfies the concerns of clients whose regulators demand precision and compliance in production and delivery forecasts.

If your company has complex processes that are a competitive differentiator, Apteian SPM for Ross ERP has the power to integrate and support these processes.

## SEAMLESS INTEGRATION AND TARGETED ANALYTICS THROUGH THE APTEIAN BUSINESS PLATFORM

The Apteian Business Platform brings to bear a comprehensive data-sharing backbone based on Apteian’s Event Management Framework (EMF) product. EMF is a time-tested product providing business monitoring and connectivity between critical enterprise products.



As a component of the Apteian Sales for Process Manufacturing solution, a subset of Apteian EMF is used to interconnect CRM and ERP. This is included as a standard part of the integration. Additionally, a full version of Apteian EMF can be purchased to interconnect broader aspects of your enterprise, not limited to Apteian products. With the Apteian Process Manufacturing solution, deploying EMF has several advantages.

As a true framework, EMF adds intelligence. The platform can detect and alter information based on software triggers. EMF can also be set to alert users when it encounters inconsistencies with expected settings, for example if certain product/process thresholds are exceeded. These factors greatly enhance your capabilities and integrations among Apteian and non-Apteian systems alike. EMF configuration and alterations are straightforward, enabling you to tailor the system to fit your needs. Finally, EMF enables seamless connectivity and information sharing between many business functions - whether Apteian or not. Most importantly, this connectivity is non-disruptive in that it is done without modifying the actual application.

## APTEIAN ANALYTICS

Apteian's Process Manufacturing solution provides advanced reporting that greatly enhances and adds to standard ERP and CRM reporting capabilities. Powered by Analytics leader QlikView, Apteian Analytics is fully mobile-enabled and widget-based for ease of use and personalization. Users can quickly produce both dashboards and snapshots facilitating deeper analysis of both internal processes and business challenges. Apteian Analytics also has the flexibility to give managers a trended view of profit, costs, and virtually any other sets of data points or key performance indicators (KPIs). This enables companies to nimbly adjust to business changes in order to meet and exceed existing and future organization goals and objectives.

Interested in learning more about Apteian? Please contact us at 1.855.411.2793 or email us at [info@apteian.com](mailto:info@apteian.com).



**About Apteian:** Apteian helps businesses profit, innovate and grow where the work gets done—in the call center, on the floor of the factory, at the end of the assembly line. That's where Apteian's CRM, ERP and Supply Chain software applications enable nearly 5,000 customers to satisfy their customers, operate more efficiently and stay at the forefront of their industry.

Apteian is where software WORKS. For more information, visit [www.apteian.com](http://www.apteian.com).