

Hartfiel Automation forges sales operations with White Cup

Hartfiel Automation uses White Cup BI and White Cup's CRM to create a sales operations "Insights Factory".



Company Facts

COMPANY

Hartfiel Automation

LOCATION

Eden Prairie, MN

INDUSTRY

Manufacturing & Industrial

SOLUTION

White Cup BI
White Cup's CRM

WEBSITE

www.hartfiel.com

About the Company

Hartfiel Automation is a Minnesota-based company specializing in manufacturing automation. Since 1958, the company has been on the leading edge of industrial robotics, pneumatics and automation in sectors ranging from agriculture and food and beverage to oil and gas and medical. In their words, Hartfiel's mission is to "build a stronger America by strengthening American manufacturing through innovative automation solutions."

Over the years, the company has grown both organically and through acquisition. Today, Hartfiel has nine offices covering 19 states throughout the country.

"White Cup's CRM really helps our sales team to manage their time better and organize their week. It's really easy to fly around White Cup's CRM on the web, and our sales team also uses the mobile app to look up contacts and other specifics when out in the field."



Vanessa Bray

Sales Administrator, Hartfiel Automation

Bringing Order and Structure to Sales Operations

Hartfiel uses [White Cup's CRM](#), an integrated CRM that works seamlessly with existing ERP platforms. White Cup's CRM empowers sales teams to identify opportunities within existing customer accounts, spot potential problems early on, and support an improved customer experience. The 360-degree view of customer buying trends and history allows for more comprehensive sales operations process with meaningful, customized sales conversations, providing exceptional customer service.

Vanessa Bray is Sales Administrator for Hartfiel. Before working with White Cup, Vanessa had never seen a CRM before. The experience of learning a system from the ground up has dramatically benefited her in training Hartfiel's sales professionals and accounting staff.

Approximately 140 individuals across the company use the system to log contacts and account activities and produce reports that deliver powerful insights to connect sales opportunities with rich revenue intelligence to meet Hartfiel's sales goals.

White Cup provides order and structure for Hartfiel's considerable customer base. They have over 50,000 contacts in their sales database and, at any time, typically have around 8,000 active sales opportunities in their pipeline. White Cup CRM provides a clear view into where those opportunities are in the sales process and how they are progressing through the funnel.

Bray says the team values the system's straightforward ease-of-use and time-saving features such as talk-to-text to import contact notes and streamlined administrative tasks. "White Cup's CRM really helps our sales team to manage their time better and organize their week," said Bray. "It's really easy to fly around White Cup's CRM on the web and our sales team also uses the mobile app to look up contacts and other specifics when out in the field."

Industrial-Grade Reporting Provides an "Insights Factory"

While Hartfiel's customers are driving American manufacturing, White Cup solutions are driving a sales operations "Insights Factory" at Hartfiel, where powerful reporting and dashboards have improved visibility, focus, and accountability.

Hartfiel Automation's CRM platform is integrated with [White Cup BI](#). This solution enables companies to gain easier access to revenue intelligence information that drives growth and business differentiation, increasing profitability and employee engagement.

Together, the [combination of CRM and BI](#) gives Hartfiel a wide range of reporting. Real-time snapshots of open opportunities and salesperson scorecards ensure timely execution and coaching. Outside sales managers review branch sales reports on a daily or weekly basis. Additional reports identify key

opportunities for more effective time management and prioritization. These include Top 10 Accounts by Revenue, Top 10 Accounts by Declining Revenue, and Top Accounts That Haven't Been Visited Year-to-Date.

White Cup BI is used to pull together custom reports with powerful combinations of data from Hartfiel's data warehouse, Infor Distribution SX, and White Cup's CRM.

Bray says she frequents the White Cup support site, which she finds a valuable resource for gaining tips and insights to further her proficiency. "There's good communication with the White Cup team," she said, "And I feel like they are always trying to move forward and make things easier for the end user."

White Cup makes it easier for businesses to use their data to make better decisions toward profitable growth. Our revenue intelligence platform gives customers easy access to information and tools that drive growth, increase profitability and differentiate their business. With decades of industry experience, White Cup is trusted by over 1,000 customers worldwide.

KEY RESULTS

- Sales staff are equipped with valuable insights anywhere through the web.
- Time-saving features such as talk-to-text help with sales rep adoption administrative burden
- Key reports identify opportunities within top accounts, accounts in decline, and accounts needing attention for more effective time management and prioritization.

Take the
Easy Path

Read, watch, and learn ways your
business can grow with revenue
intelligence tools.