

Relevant Industrial Sets Foundation For Growth With TDF to White Cup CRM Migration

Relevant Industrial is an industrial distributor that provides specialized process equipment for leading brands in the refining, petrochemical processing, OEM, food processing, upstream oil and gas, and municipal markets. Supported by a skilled team of technicians, engineers, and designers, the company extends its expertise to provide Professional Services and Engineering Solutions. This encompasses the design, specification, and execution of projects of varying scales.



450+

NUMBER OF
EMPLOYEES



PROVIDE A MORE
STREAMLINED UX



STRENGTHEN RELATIONSHIPS
WITH VENDORS



EMPOWER BOTH INSIDE
& OUTSIDE SALES REPS

When the company acquired Precision Fitting & Gauge Company, PF&G was using Tour de Force (TDF) CRM, which was considered a best-in-class solution at the time. However, as the company grew, they discovered it wasn't as easy to use as they'd hoped.

The navigation was complicated, requiring multiple steps to perform simple tasks. The team needed a more intuitive, mobile-friendly CRM. With White Cup on a mission to migrate TDF customers to the new-and-improved White Cup CRM, Relevant Industrial's CRM & Marketing System Administrator Angela Hirsch immediately saw its potential for outside sales, inside sales, and company-wide collaboration.

Relevant Industrial

INDUSTRY

Industrial distributors of instrumentation and automation, rotating equipment, purification, and thermal equipment.

LOCATION

Headquartered in Houston, TX, with 30 locations across the United States

ABOUT

Relevant Industrial, LLC was established in 2018, building upon the legacy of acquired companies with a combined history spanning over 70 years. The company is dedicated to serving customers by providing products and services, aiming to guide them towards innovative and improved methods for achieving greater operational efficiency.

“I love the single-page concept of everything right there on that one page.”



Angela Hirsch
CRM & Marketing System Administrator
Relevant Industrial

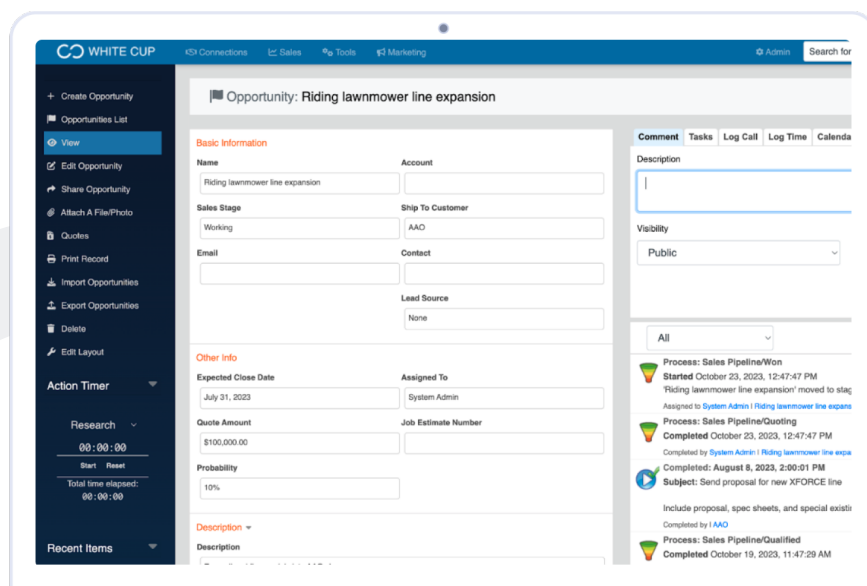
“The layout of it, in general, I’m just blown away. It has a more modern look to it and feel to it. With TDF, we struggled.”

Discover why they chose White Cup CRM and what they hope to accomplish by making the switch.

White Cup CRM Features That Unlock New Opportunities

Fostering collaboration with easier navigation

Migrating from TDF to a more user-friendly, responsive CRM will help Relevant Industrial improve transparency and collaboration between teams. When users log in to White Cup CRM, they immediately see where to go to log a call, create a task, or create a calendar event.



They can see the total sales for each account at a glance instead of calculating sales from multiple ship-to locations associated with the same account.

White Cup CRM's modern, intuitive layout provides a more streamlined user experience for sales, account managers and marketing.

“Right now, our engineered solutions team is working out of email. The account manager goes and puts the opportunity in and then they email the proposal team.”



Angela Hirsch

CRM & Marketing System Administrator
Relevant Industrial

Allowing those team members to create tasks that everyone can see from a single screen, rather than relying on email, will significantly improve the company's processes. The inside sales team will also be able to see all activity happening with any account, identify upsell opportunities, and create quotes right within White Cup CRM.

Improving sales and marketing efficiency with automated workflows

White Cup CRM also makes it easy for the sales and marketing team to create automated workflows, something they couldn't do within TDF CRM. Using pre-built templates, the sales team can create a series of emails reminding customers of an open deal, and they can assign tasks to other team members as soon as the deal closes. The marketing team can create personalized emails for a specific group of customers or prospects, schedule them, and see how many people opened and clicked the emails.

They can be more proactive about reaching out, too. For example, Relevant Industrial is excited to have the ability to send an automated email to thank new customers and ask them to write a Google review.

Saving software subscription costs by replacing other solutions

The potential for White Cup CRM to replace multiple tools within the company was another driving factor in its implementation. Hirsch pointed to the usefulness of the information housed within White Cup CRM and the ease of accessing this information as a single source of truth. Her vision is for White Cup CRM, powered by BI, to ultimately replace functionalities that systems like Power BI and HubSpot currently offer.

White Cup CRM builds upon the functionality the organization was used to with TDF but will make it easier for the team to take swift action with information easily viewable and accessible.

Hitting KPIs with White Cup CRM

To achieve operational success, Relevant Industrial mapped out five company-wide key performance indicators that would set them on the right track to achieve larger corporate goals. A CRM directly aligns with each of these targets, bringing cohesion and transparency across the organization.

Here's how White Cup CRM will help the company hit those essential KPIs.

Sales performance management

With widespread disruptions resulting from the COVID-19 pandemic, getting teams back on track was an important adjustment that needed to be made. Relevant Industrial's VP of Sales advocated for a "boots on the ground" approach to keeping business moving forward. White Cup CRM's activity management and team alignment will help the company stay on track and have a full view of what needs to be tackled and when.

Improving collaboration between outside sales and inside sales

Solving current challenges and meeting daily operational demands begins with the right training and tools at the ready. White Cup CRM empowers both inside and outside sales reps to sell new products to customers with the right information always within reach. Better training and visibility into actionable insights means improved conversations with leads and customers.

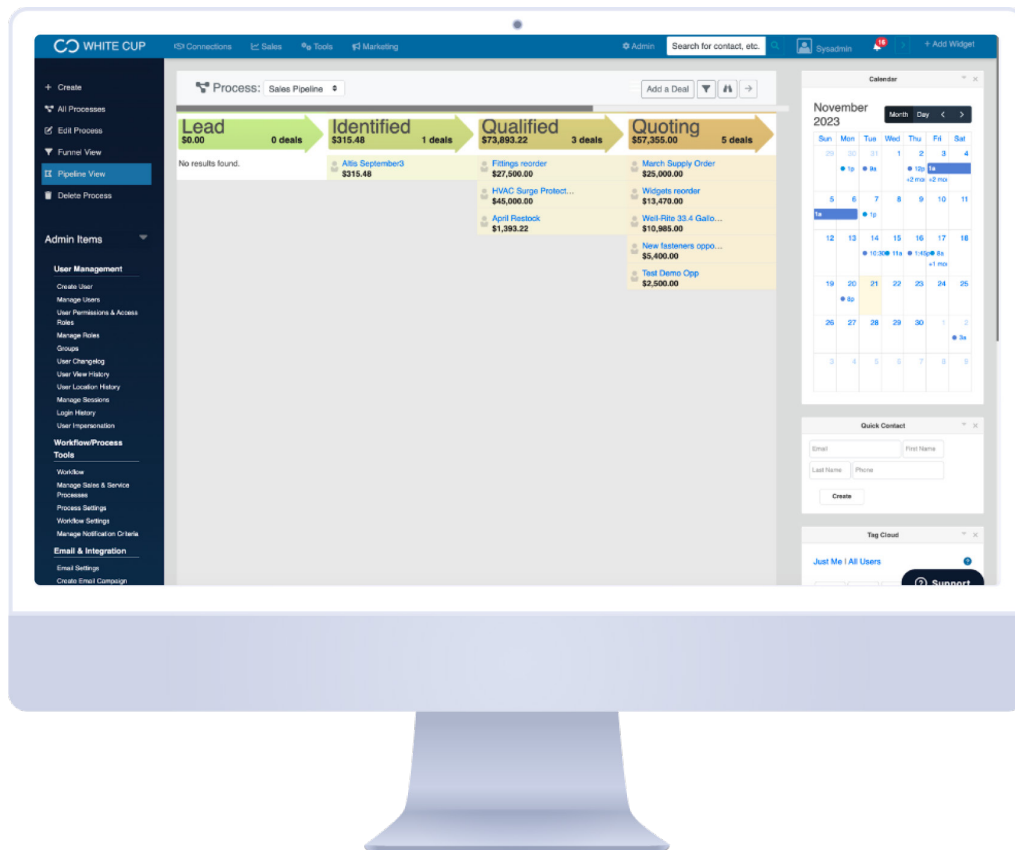
Improving vendor management

For Relevant Industrial, proactively managing vendor relationships is key to ensuring high-quality services and products. White Cup CRM provides visibility into forecasted demand, enabling operations teams to align vendor capabilities and capacity. Equipping procurement and supplier managers with data-driven insights into upcoming projects and support needs allows Relevant Industrial to collaborate more effectively with vendors, mitigate risks of shortfalls, and ultimately deliver greater value to customers.

With White Cup's vendor management capabilities, combined with its core strength in customer relationship management, Relevant Industrial gains end-to-end visibility and control across its business partnerships.

Stronger sales pipeline management

Guiding new leads and prospects through each stage of their pipeline means optimizing each step of the process to ultimately achieve more successful deals. White Cup CRM offers improved visibility at every benchmark, along with the ability to easily follow up with leads through automated workflows. Managing the pipeline is streamlined and simple with the right data available in one place.



Closing more deals faster

The company sought a way to view activity within certain time frames to jump on pending deals and uncover new opportunities. White Cup CRM offers the information they need in quote delivered and quote processed stages so sales reps can easily see what is happening with every account and every potential sale. With White Cup, Relevant Industrial will be able to win more deals with clear insights into their best opportunities and the tools to act on them.

White Cup's strong customer support, coupled with an intuitive interface, are setting up Relevant Industrial for a successful implementation. With the wide breadth of new functionality now available to this former TDF customer, they are equipped to reach their KPIs and crush larger company goals.

KEY RESULTS

- **Strengthen relationships** with vendors
- **Reduce "games of telephone"** and back-and-forth communication
- **Improve strategies** to meet company-wide key performance indicators
- **Streamline marketing initiatives** and campaign development using sales data in a single platform

Work Together To **Win More**

White Cup helps distributors win more deals, customer loyalty, and market share. With a powerful CRM that empowers team members to act on their best opportunities faster, business intelligence solutions that transform customer and product data into crystal-clear insights, and precision pricing software, the White Cup suite helps distributors shift from reactive, siloed customer interactions to proactive, collaborative growth strategies. With decades of industry experience, White Cup is trusted by more than 850 customers globally.