



How Haldex brought everyone onboard – a CRM success story

Getting customer data out of silos

Haldex provides unrivalled expertise in brake and air suspension systems for heavy vehicles. Headquartered in Landskrona, Sweden, the company has offices in 19 countries and 2,300 employees spread across four continents. Before 2018, this large organization had a culture where much sales information was trapped in silos. Sales staff largely kept their knowledge to themselves in files on their own computers or paper documents. There was no central system that would enable more robust knowledge sharing, which naturally resulted in inefficiencies in situations such as sales staff turnover and absences.

After joining Haldex in 2017, Ben Prickett, Aftermarket Sales Manager for the UK and Ireland, drew on his experience using CRMs at other multinationals and added his voice to several others calling for a CRM system.

“We wanted to increase transparency, leverage the greater expertise within the organization and make sales processes more efficient,” said Ben.

This sparked Haldex to create a CRM project group and appointed Ben the project lead. The first step was to determine what kind of CRM system would best fit the company’s needs.

Dynamics 365 and Stratiteq – a winning combo

To save time, Haldex was keen to find a solution that would allow importing customer data from existing systems instead of having to enter data from scratch. But the European and American sales staff had data in different versions of Microsoft legacy systems, which posed a major challenge.

“We eventually realized that Dynamics 365 would be the best CRM system to meet our needs, given that we were already heavily invested in Microsoft and this would improve compatibility. The ability to add other Dynamics 365 modules later at our own pace also appealed to us, said Ben.

After meeting with Stratiteq, Ben was confident that they were the right choice as well:

“ We were blown away by Stratiteq’s knowledge and drive. It was clear that Stratiteq had unrivalled knowledge of Dynamics 365 and was willing and able to understand Haldex’s culture and needs. This was important for developing a solution suited to our business model rather than the other way around. “

Many people – one CRM

It presented a challenge that different countries and regions within Haldex used different languages, practices and ways of working. For instance, the American route to market differed from that of the Europeans. However, the budget only allowed for creating a single system, so Haldex needed to find a solution that would be useful and usable for everyone. Therefore, Ben’s CRM project group ensured representation from several different countries and continuously sought input from employees across the organisation as it went along.

In weekly project meetings and workshops, Ben obtained feedback and buy-in within Haldex while brainstorming and coordinating with Stratiteq specialists for specific aspects of the CRM system.

Ben underlined that “this continuous dialogue was vitally important. The joint workshops were crucial for both discovering advantages in the working methods of other regions that could be adopted by everyone and finding appropriate compromises.”

User adoption – the key to a smooth transition

Haldex wanted to improve the sales opportunity process by mapping the exact stage in the quoting process and automating manual processes in relation to paperwork.

“Stratiteq helped us customize this process in the CRM, which could give transparency and sales processes efficiency a major boost if enough users would adopt this improved way of working. Ultimately, the system turned out to be everything we wanted it to be – but if no one uses it, it won’t help. Therefore, we didn’t want to just thrust a new system on people and say good luck,” said Ben.

The CRM project group realized early on that user adoption would be decisive for the success of the transition to the new CRM system. Therefore, a group of super users was created, with one champion for each country. A CRM support team in Microsoft Teams, online tutorial videos on YouTube and an FAQ blog were also launched following extensive face-to-face training for all users.

The thorough training and support initiatives all had a noticeable positive effect on user adoption. As a result, the number of appointments booked through the CRM increased sixfold from the launch in July 2019 to the end of the year.

Long-term partnership

From the start, Haldex planned to implement its CRM system in multiple phases and the initial launch was only phase 1. Today, Haldex is continually launching additional CRM features and incorporating further feedback from users in close coordination with Stratiteq to drive continuing improvements to the CRM system.

“Stratiteq is a long-term partner for us. We appreciate that it is not just ‘one and done’ but that we can continue to collaborate closely after the initial launch and continue making improvements over time. I can’t praise enough the way it all came together. Both parties involved the right people at the right time to make it happen,” said Ben in conclusion. “