



## **Baumit Salesforce Implementation: the right tools at your fingertips**





**As an Australian technology consultancy, it's pretty rare for us to work with clients in other countries. So when we had an opportunity to work with Baumit in France on their Salesforce implementation, naturally we said "oui"!**

### The brief

As a fairly new entrant to the French market (since 2014), leading European building materials brand Baumit wanted to be known for being timely, proactive, collaborative and switched on when dealing with customers. As a new player, it needed to be lean in its go-to-market but still have the best tools to set their sales and delivery teams up for success.

When Baumit approached Carnac Group, they were looking for a Salesforce consultant to help them achieve their vision for customer engagement. Critical to success was involving their own people

in the project to ensure the final solution was tailored to their own needs and experiences. They particularly wanted to increase their effectiveness over a long sales cycle involving a myriad of interactions with prospects, customers and project participants up and down the supply chain. An average Baumit pursuit lasts more than 12 months. It can also involve relationships with dozens of individuals. Missing the moment or not understanding where different suppliers fit into a project means Baumit would most likely miss out on a job... They also needed an integration between Salesforce and Microsoft Dynamics to avoid duplication of effort and data.

### What

Salesforce implementation

### Key requirements

- Pipeline management with an integration to Contact Business
- Meeting planning and recording
- Integration with Outlook and Microsoft Dynamics AX using Rapidi

### Time frame

Dec 2015 - Mar 2016



## Our approach

Baumit had a clear vision, but they weren't sure about what exactly they needed from Salesforce to achieve it. Our consultant had a dynamic, flexible approach to help Baumit explore Salesforce as their own requirements took shape. This included spending two weeks on site to conduct daily user testing and configuration based on feedback. Baumit gave input each morning, with our consultant making changes in the afternoon. Our consultant then demonstrated these changes the following morning, allowing Baumit to see the impact of their changes within 24 hours. This collaborative process was repeated every day, ensuring Baumit had their Salesforce fully configured to their business by the end of the two weeks. Integrations were then completed off-site. This helped to ensure face-to-face time with Baumit focused on understanding needs and refining requirements to deliver their tailored Salesforce platform.

## About Carnac Group

We advise businesses on any aspect of their technology journey from discovery and strategy development to project implementation and ongoing support. As an official Salesforce Partner, we love helping businesses discover how Salesforce can help them reach new heights.

## Why Carnac?

**“Carnac Group were spot on for us. They delivered a technical solution which matches our commercial requirements exactly. For technical experts, they were very business-oriented. We couldn't be happier with the result.”**

Nicolas Motte, CEO Baumit

## The result

More than six months since implementing Salesforce, Baumit has vastly improved how they engage with prospects and clients.

“For me it's quite simple. We spend less time overall on each pursuit, but we are more thorough and our conversion rate is getting better and better.”

Nicolas Motte, CEO Baumit

## Most valuable for Baumit

**Pipeline management.** Shows work secured and work in pursuit. This helps the Baumit team be more thorough in running to ground every opportunity.

**Contract management.** Gives a richer, more accurate picture of the market players: who is involved in what project, the stage of the project and when Baumit needs to act.

Of course, this is only possible because Baumit's people are committed to capturing and sharing relevant information on Salesforce. But for them it's a no-brainer. Using Salesforce makes their jobs easier and increases their chance of success.

## Uniqueness of the project

The steps in Baumit's sales cycle are no different from any other business. But the duration of the cycle and the number of interactions with prospects, customers and project participants up and down the supply chain mean their pursuits are highly targeted, complicated and expensive. Getting a tool like Salesforce to reflect this complexity and make it quite simple, user-friendly and valuable for Baumit's people was challenging and extremely rewarding to realise. Also, it's not often we get to spend two weeks with our clients in France!





**Salesforce**



**Technology Strategy**



**Project Delivery**

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