

- **SAP-Info 115 – Practice**

*Paperless protocol thanks to the SAP CRM Mobile Service*

## **Customers Sign Digitally**

With the introduction of the SAP CRM Mobile Service and eSignatureOffice\* signature software, the refrigeration manufacturer Axima Refrigeration GmbH has optimised its customer service structures. As all data between head office and service staff is now exchanged electronically, paperwork - once a burden for all concerned - is today a thing of the past and even the customer signature is digitally reproduced.

\*Due to trademark regulations, only the follow-on product can be named here.

## ▪ SAP-Info 115 – Practice

---

### **AXIMA REFRIGERATION GMBH**

Axima Refrigeration GmbH is a company specialising in refrigeration and cooling techniques. Their comprehensive supply and service program includes the planning, manufacturing, distribution and maintenance of cooling equipment, units and towers, including industrial, food and brewery refrigeration installations, among others. In 2002, Axima Refrigeration employed approximately 480 people with a turnover of 70 million euros. It also has several branches in Germany, with associated companies situated in Switzerland, France, Belgium/Luxemburg, the Netherlands, Spain/Portugal, Brazil and Poland. The company, based in the German town of Lindau, belongs to the well-established Suez group, which employs around 190,000 people in 120 countries.

---

### **ITELLIGENCE AG**

Itelligence AG is the worldwide leading SAP full-service provider with around 1,000 highly qualified employees in 15 countries and 34 branches. As a partner of mySAP.com (channel, service and support alliance, hosting) and of Global Service, Itelligence implements complex projects in SAP environments for more than 1,200 customers around the world. With its comprehensive service range, from SAP consultancy and licence distribution to outsourcing & services and even the development of SAP branch and individual software solutions, the company achieved a global turnover of 168.5 million euros in 2002.

---

Formula 1 racing cars pass the start and finish straights of the German Hockenheimring circuit at top speed. Thousands of spectators hold their breath when two cars take a sharp bend, barely losing any speed. Everyone is amazed: how can the car stay on track at 180 mph? The fact that the car does not lift off in the chicanes only depends in part on the driver's skills, since even the best pilots cannot defy the laws of physics. That's why nowadays nothing is left to chance in the aerodynamics of Formula 1 racing cars, with the greatest possible emphasis placed on security. With the help of computer-assisted test systems and modern wind tunnels, road-holding, cornering ability and the load capacity limits of driver and vehicle are exactly simulated. Since the tests are performed at constant conditions, the wind tunnels are equipped with powerful cooling devices regulating the air temperature.

The equipment is manufactured by Axima Refrigeration GmbH, based in Lindau am Bodensee, in the south of Germany. The company also undertakes the delivery, assembly and maintenance of these high-tech refrigeration systems; a demanding task for the service technicians working in the pilot plant. The servicing of industrial, brewery, cereal cooling installations, cooling towers, re-cooling systems, freezing and liquid refrigeration units, as well as other cooling equipment is a real challenge for the company's technicians.

### **SAP CRM Mobile Service lightens the technicians' load**

In order to take a considerable part of the administrative weight off the shoulders of the external service personnel, the decision was taken to implement the SAP Customer Relationship Management Mobile Service. Complemented by eSignatureOffice software from the Stuttgart-based company StepOver GmbH, this solution now relieves technicians of tiresome forms and paperwork. "In the past, maintenance orders came in by fax", remembers the service technician

## ■ SAP-Info 115 – Practice

Andreas Reich. The technician then drove to the client to perform the service. “Afterwards, a protocol had to be created for the performance acquisition check, in which all relevant data was manually introduced”, an arduous process according to Reich, which was prone to errors. The multiple recording stages at head office were also very inefficient.

Nowadays, Reich and his colleagues complete the paperwork with their notebooks. The system automates and facilitates all the processes, which are electronically handled, from the receipt of orders, the performance check and the data synchronisation to the encrypted transmission to head office in Lindau – even the customer signature is digitally recorded. Once at company’s main centre, the data is registered revision-safe in the document management to enable further processing by the service, accounting and personnel departments. Reich and his colleagues are very enthusiastic about the process, whilst customers “also react positively to the new system”, reports the technician, based on his on-site experiences. This is no surprise, since customers now have the possibility of direct control. Nevertheless, to achieve all this, the company’s IT department and its project partner Itelligence AG had to deal with a fair amount of work.

### **Integration into other SAP solutions important**

The fact that the company decided in favour of the SAP CRM Mobile Service solution was based on the smooth integration into the existing SAP environment, among other advantages it offered. “We have considered several solutions and also contemplated a Java development. However, as far as integration is concerned, the SAP solution was clearly one step ahead”, stressed the business manager Ulrich Holzhey, IT manager at Axima Refrigeration and responsible for SAP project management. The start of the “REF@Mobile” project was in January 2003 and just ten months later, the first external service offices could work within the new system. The production start-up was not simultaneous, but the system was gradually implemented in the eleven regional offices, representing 120 service staff members, with “everything within the planned cost and time frame”, in Holzhey’s words.

The project team was comprised of five Axima Refrigeration employees and Itelligence consultants. In order to guarantee punctual and efficient system incorporation, Holzhey also included the key users of the affected areas of service, personnel and billing. The consultants and programmers, under the coordination of graduate engineer Mark Albrecht, project manager of Itelligence, were responsible for the programming of missing interfaces and for the functions required by Axima Refrigeration. The technical space was implemented in CRM with all installation technical data, including the historical record and set values. The classification of technical data was also installed as a new feature by the consultants. Text blocks were also created for the input of information required for the performance check, something “which considerably facilitated the operation and increased customer acceptance”, according to Albrecht.

### **Project developed without serious difficulties**

In spite of these specific tasks, no major obstacles were encountered. Occasionally, they faced minor setbacks, especially with the software installation on the 160 notebooks, or with the database, however, none of this was a serious problem and everything could be rapidly solved. SAP could also keep up the tempo. Albrecht concluded: “All in all, SAP support was satisfactory”. The training of the 160 technicians, which the project managers completed in a period of four months, was also a smooth process. “Each technician was trained in three days: half a day for the operation of the notebook and two and a half days for SAP CRM Mobile Service”, explains Holzhey. After this training, each service technician received his notebook case with the respective data and from that moment on he could start work.

For Holzhey, the most important challenge was the fact “that the IT part of the project was unknown territory”. Especially the focussing on a higher level of IT security was a crucial aspect, as now it had to be guaranteed that the sensitive customer data on the notebooks of the service staff did not fall into the wrong hands. For this reason, the notebooks of the external

## ■ SAP-Info 115 – Practice

service members were secured against unauthorised access by means of user ID, security tokens and disk encoding. For the Axima Refrigeration IT team, an additional difficulty was that normal IT support had to be maintained in addition to the project work. Nonetheless, once again Holzhey and his team members managed to reconcile the various priorities. Since the cooling specialist outsourced the CRM area hardware implementation to Itelligence, the availability of the systems at Axima Refrigeration was perfectly guaranteed as well.

### **Intensive testing as a recipe for success**

After the implementation stage, the project team set up a help desk based on SAP R/3, “where all problems were recorded and channelled”, in Holzhey’s words. Initially, a large number of requests came in - around 20 to 30 each week. In each case, the help desk documented the incidents with the corresponding history. In order to stem the tide of questions, only the problems that could not be immediately solved by telephone were recorded. However, the project team faced no unsolvable problems, which Holzhey attributes to the extensive testing during the implementation phase.

“The recipe for success for a software project lies in testing, re-testing and testing once again the solution before launching it”, he reveals with a wink.

Solid preparation pays off in practice. Even difficult processes, such as personnel management, are smoothly dealt with; this also includes time overlapping and completion confirmation, but also specific aspects of collective agreements and the employment contracts.

Even so, Holzhey misses certain branch-specific functions. For instance, he would find it interesting to connect the system to the RI-scheme. “Each installation has a so-called RI-scheme with the corresponding control and measuring units. The availability of a connection would be very important for our numbering”, points out the head of IT. In his opinion, it would also be desirable to allow the download of installation measuring data to the CRM system.

### **Higher process transparency**

Among the fundamental advantages, he highlights the integration into other SAP solutions, the global process with service orders and the higher transparency in comparison with previous systems. The execution of the service process is also much faster, which can lead to considerable savings with around 500 maintenance and service contracts each month. The higher quality of service activities through the modern equipment as used by technicians is another asset according to Holzhey, since the motivation of external service staff members will increase.

In order to reveal further advantages, the next steps to be taken have already been planned. Firstly, the complete SAP system service process should be performed. Parallel to this, another document management project is already underway, focusing on “electronic project files, i.e. the document exchange with customers”, as Holzhey explains. Finally, the construction of a service portal is planned, with the aim of granting Axima Refrigeration customers access to all relevant information through this platform.