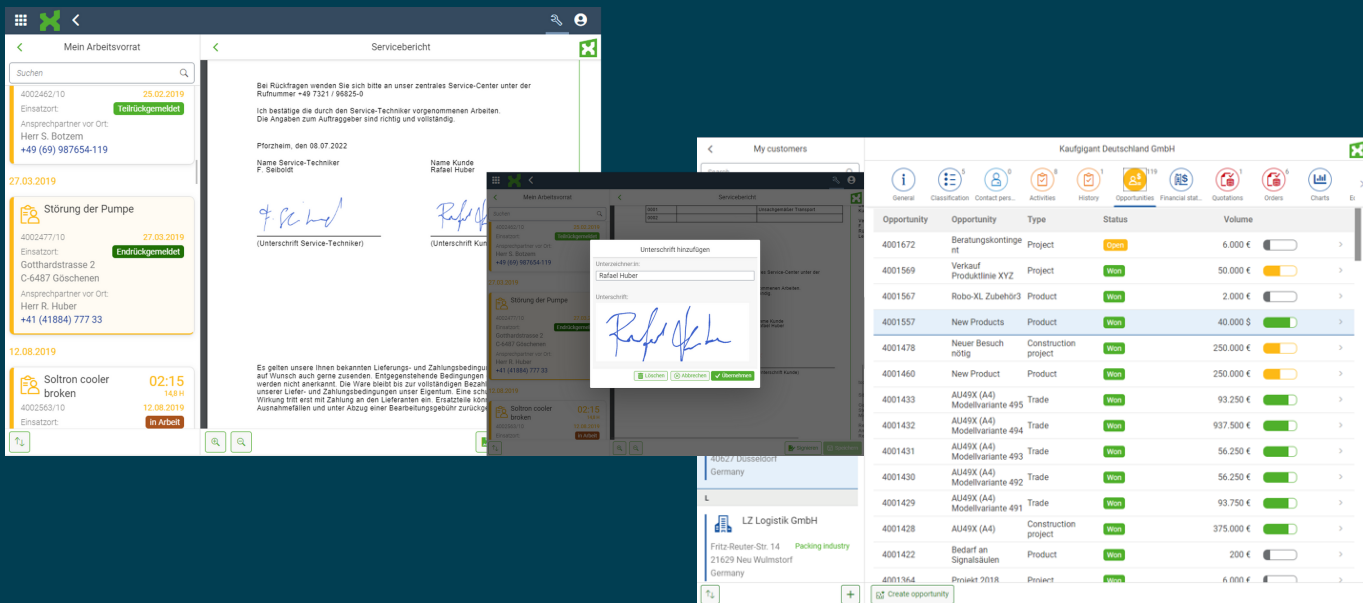# Neptune Software

itmX Partner Solution:
A modern CRM solution

Modern CRM doesn't have to be a chore. itmX makes the field sales and field service experience more mobile and enjoyable with Neptune Software.

Challenge

Sales and field service teams can't be effective when information is scattered and incomplete. They need modern, mobile experiences that give them a 360-degree view of the customer.
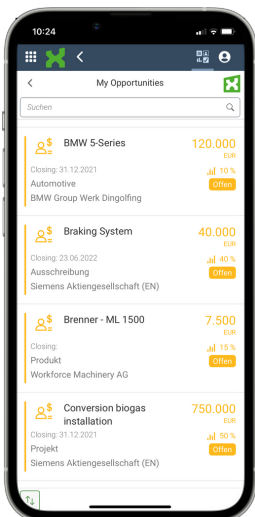
Solution

Three mobile apps powered by Neptune DXP, that are easily integrated into the complete CRM solution (based on the SAP ERP ECC or S/4HANA) to automate and simplify workflows for field sales and field service teams.

• A mobile app that gives sales reps a quick and complete overview of their customers and empowers them to perform all their sales-related tasks on the go on their mobile devices, whether on- or offline.

• A product catalog app with robust product information to empower sales reps to present the USP of their products and directly create an order with the customer.

• A mobile field service app that allows service technicians to edit their worklists, report work times and resources and have the digital service report signed off directly by the customer.

Results

With a streamlined and attractive user experience, itmX customers are satisfied and happy.

By applying mobile capabilities within the itmX CRM, the company has empowered sales and service teams to spend less time gathering information and more time focusing on what's most important - their customers.

In addition, the Neptune DXP enables both itmX consultants and customers to develop additional apps for their sales and service use cases with minimal effort.

Challenge

Turning leads into loyal customers relies on timely and complete information and easy, modern workflows

As the first - and main - point of contact for enterprise customers, field sales teams rely on timely customer and product information to build and manage relationships and close deals. When that information is out of date, disorganized, spread out among different systems, or available only on paper, sales teams can't be effective for their customers or their business.

To be effective, sales reps need information readily available that helps them prepare for, conduct, and wrap up their customer meetings. This includes details such as quotes, orders, reports, and sales turnover information as well as product, personal task and visit details.

Bringing that information together to drive more value to the field sales workflow while enabling a 360-degree view of the customer is what itmX is all about. For more than 20 years, the Germany-based company has been a solid presence in the CRM market, bringing well-built, easy-to-use CRM processes that are fully integrated with SAP ERP to manufacturing, wholesale and specialist trade enterprises throughout the globe.

Solution

CRM that combines the convenience of mobile, automated processes with deep SAP integration

Along with the seamless integration of the itmX CRM suite into the SAP ERP ECC and S/4HANA landscape, itmX also brings a fresh perspective to CRM mobile apps for sales and service.

"Similar to the consumer market, B2B solutions today also must provide a great experience. Having a complete CRM solution doesn't matter if users don't like it and won't use it," says Robin Hartmann, Head of Modern Workplace at itmX. "That's why we have our own UX team - to focus on good-looking solutions that improve business and help people have fun at work. It's all about the experience. We need solutions that inspire"

And it's precisely why itmX chose Neptune Software as a development partner for their mobile solutions. Neptune DXP offered the company a rapid, low-code SAP-certified app development platform designed for enterprises, which could be embedded into its existing ABAP stack with zero IT footprint.

They set out to build three solutions:

- A mobile app to give sales reps a quick and complete overview of their customers and empowers them to perform all their sales-related tasks on the go on their mobile devices, whether on- or offline. This app would also enable sales reps to support their daily tasks and help them to manage customer meetings. They would also be able to type notes or use voice integration such as Siri to record visit notes and create follow-up tasks within the CRM.
- A product catalog app for field sales to provide product information and comparison capabilities, enabling sales reps to present the USP of their products and directly create an order together with customers via a shopping basket. The app would provide relevant product information such as pricing and discounts, product availability, as well as pictures and videos to make it easier to close a deal right in a meeting.
- A mobile field service app designed to enhance customer service. This app would be designed to make it easy to dispatch field service teams to a new service case and provide them with a complete overview of the information they need to manage it. This includes customer information, the work request, the service record and maintenance history of the machine, and more. Field service reps would then be able to quickly and easily complete the service case, noting the work completed, parts changed, and the amount of time it took to complete the repair quickly and easily. From there, it would be a simple click to generate a digital service report for the customer to sign and for accounting to send a bill. It's a process that speeds up service for the customer while streamlining workflow for the field service and account management teams. Even better, the app could be easily customized and enhanced to fit customers' unique needs and processes for field service management.

Results

Modern, mobile capabilities make it easy for itmX customers to focus on what's most important – customers

"With information readily available in one place, our customers have really improved business processes and increased how quickly they can get things done," says Robin. "By applying mobile capabilities within our CRM, we've empowered sales teams to spend less time gathering information and more time focusing on what's most important – their customers."

Automating manual steps is paying off for itmX. With a streamlined and attractive user experience, itmX customers are satisfied and happy. Today, it's easy for field sales to find and walk customers through products, even if there are 10,000 items in the catalog. Ordering too has been simplified and takes less time. Before these mobile capabilities were available, customers may have spent Fridays in the office entering visit reports. Now, after a customer meeting, they can immediately and easily enter visit information by typing it in or using speech-to-text.

Additionally, with a low-code platform to build new apps and mobile capabilities itmX can extend its development resources with consultants when needed. "When processes get complex and need integration, that's a big benefit for us," says Robin. "With pre-defined components and apps available in Neptune DXP, we can easily show customers even more things that are possible. One customer, for example, asked us to develop a mobile reporting app that sales reps have readily available to them in the field, all easily available right within the CRM they use each day."

Moving forward, itmX has plans to enhance mobile solutions with additional functions and use cases to continue to provide its customers with modern solutions. Neptune will be used to build customer-specific apps for individual processes around the CRM business and bring tangible benefits to the users.

That's the kind of workflow improvement that makes everyone's day a little easier, and work more satisfying and enjoyable. "Ultimately, it's not about collecting and using data, it's really about how to bring convenience to the customer," says Robin. "That's what we strive to do."

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> Robin Hartmann, Head of Modern Workplace at itmX

About itmX

itmX stands for innovation, trust, mindfulness, and experience. Our innovative solutions in the CRM and e-commerce environment have attracted over 120 enthusiastic, satisfied customers. In our innovation labs, we develop not only classic CRM functions but also highly sophisticated use cases involving digital assistants using artificial intelligence.

Learn more at https://itmx.de/?lang=en

About Neptune Software

Neptune Software is a rapid application development platform vendor with more than 660 enterprise customers and over 3.5 million licensed end users globally that empowers IT departments to deliver tangible business outcomes. Neptune Software offers with its Neptune DXP, a leading low-code, SAP-centric, enterprise app development platform to digitize and optimize business processes and user interfaces – at scale and with ease. Neptune DXP provides a fast and cost-effective way to industrialize the development of custom applications - saving companies time and money on development, integration, and operations.