

*WebEx WebOffice is a natural fit for us. It's the backbone of our business. Our industry is information intensive and keeping track of information is mission critical for us. We have millions of gigabytes stored on our WebOffice. If one of our computers crashes, we don't have to worry about losing any data; we just go to another computer and get on our WebOffice and it's there.*

— Mark Laws, Chief Operating Officer, Rockwell Technology Group

## Rockwell Technology Group uses WebEx WebOffice for customer relationship management



### INDUSTRY

Software

### SUMMARY

Rockwell Technology Group gains efficiencies using WebOffice for customer relationship management (CRM), group scheduling, and internal communications. The firm also saves time and money using WebOffice to facilitate the delivery of custom-designed software to its clients.

### ABOUT

#### ROCKWELL TECHNOLOGY GROUP

##### Line of Business

Business Information Solutions

##### Headquarters

Grand Rapids, MI

### Customer Business Profile

Rockwell Technology Group, based in Grand Rapids, MI, designs, builds and implements web-enabled solutions, and provides custom programming services with SoftVelocity's Clarion® 4th generation language, IBM's RPG/400 platform and Microsoft's Visual Basic and C Plus® platforms. Rockwell applications are compatible with the Microsoft Access® and SQL/Server®, Oracle® data management systems, and the IBM AS/400 I-Series DB2 database servers. Rockwell also provides Enterprise Resource Planning (ERP), and project management services.

Rockwell's customers are spread across Canada, and are also based in Chicago and Detroit — with 65 percent in manufacturing services for the 'Big Three' auto companies, and the remainder in management services and insurance.

### The Situation

Rockwell Technology wanted to improve efficiencies in four areas.

### Customer Relationship Management

The company wanted to better manage and access client data from the road. Before WebOffice, its client database was on a desktop. The only access to it was

at the headquarters.

### Group Scheduling

The firm also wanted a convenient group scheduling system for booking client visits for employees not based at headquarters.

### Software Delivery

Rockwell Technology Group wanted to find a more efficient and cost-effective way to deliver its custom-designed software to clients. Before WebOffice, the firm's developers would have to burn the software releases and patches onto CDs or DVDs and either mail them, or deliver them in person to customer sites.

### Internal Communications

Rockwell Technology Group wanted to be able to save driving time by holding "discussions" remotely, while still maintaining a record of ideas generated, and allowing employees to join in the "discussions" at their convenience.

### The Solution

Rockwell Technology Group uses WebEx WebOffice to manage its customer information, to schedule customer site visits, to deliver software to customers online, and to communicate and collaborate internally.

*“It’s fantastic to have all this information at our fingertips online, in our WebOffice, when we’re at a client site. Most client locations have wireless in their facilities, or a place where you can plug into Internet access, so you can update and retrieve this information easily.”*

— Mark Laws, Chief Operating Officer, Rockwell Technology Group



## The Benefits

“We couldn’t run our business nearly as efficiently without WebEx WebOffice,” says Mark Laws, Chief Operating Officer, Rockwell Technology Group.

## Customer Relationship Management

Rockwell Technology Group keeps all of its client contract information and client profiles — information about client hardware and software — on the WebEx WebOffice Database Manager for easy access, anywhere, anytime.

“We were able to take all the 3,000 fields in our old, cumbersome database and easily import them into one of WebEx WebOffice’s prefab databases.”

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And, the company takes advantage of the WebOffice Database Manager Activity Log to better manage the information — facilitating a seamless progression for customer service and call back activities.

“We set it up so the WebEx WebOffice Database Activity Log keeps track of and pops up the next action date for that client. We never miss anything. We know when we first come into the office in the morning to check it.”

“We use it the same way with prospective customers. A glance at the WebEx WebOffice Activity Log tells me what’s been done and what needs to be done next. If that something happens to be ‘my baby,’ but I can’t do it, I can call John or Bernie and say ‘We need to do this with so and so, go in and look at the record and follow up for me.’ And they can pick up right where I left off, without a hitch.”

“This looks good for the company. Our customers or prospects will say, ‘Wow, a call from two different reps and everybody’s on the same page and nothing fell through the cracks.’ It makes our company look great!”

## Online Calendar and Group Scheduling

“We use the WebEx WebOffice Online Calendar and Group Scheduling in conjunction with the Activity Log to schedule on-site visits. Since we’re not all based in the home office, we want to make sure we don’t double-book ourselves for customer visits. For instance, I can call a customer to set up an appointment for John — first looking online at John’s calendar to make sure I’m not double-booking him — and then send him an email saying, ‘I’ve scheduled you to go see so and so.’ I can check off the switch that he has to respond to me to let me know he’s seen the message. Then he or I can set up a two-hour prior reminder of the event. This works out really well.”

## Instant Delivery of Custom-designed Software

WebEx WebOffice is enabling Rockwell Technology Group to instantly deliver custom-designed software updates and patches to its customers — saving time and money for Rockwell and its clients.

“As soon as our developers have new custom software ready for delivery, I can call up our customer and say, ‘It’s ready. Go to our WebEx WebOffice location, click on the Guest Folder and the software will be in there under your company’s name. You can download it and you’re good to go,’” says Laws.

The company has 20 to 25 customers that it gives special access to WebOffice Guest Folders. With WebOffice, Rockwell can set up folders with varying kinds of permissions for access — read-only, read and add, manage, etc. This allows the company to control exactly what people

access and what they can do once they’re using it.

WebOffice also often saves the company from having to travel to customer sites. “Our customers like the fact they are not paying for us to travel to their site to upload the software; it saves them the consultation charges that normally would be involved,” Laws says. “For us, the time savings are tremendous. It allows us to service even more clients. So, it’s a win-win solution.”

“We just did a specialized shipping label program for one customer and then, when his business expanded internationally, he needed to add a country specification onto his label. We were able to update the program and put it up on our WebOffice. The customer went into the Guest Folder, unloaded it immediately, and put it on his machine.”

WebOffice not only provides efficiency, but security as well.

“In delivering our software this way, we’re not concerned about security,” says Laws, “because WebOffice offers SSL, and even beyond that, we control the security because we can put whatever security we want on the software program itself.”

## Discussion Forums

“We frequently jump on WebOffice Discussion Forums to hold ‘discussions’ remotely and it saves us a lot of driving time — easily 10 or 15 hours a week. Two of us live 45 or 50 minutes from the office and the rest of us live 10 to 15 minutes away.”

“It’s nice because WebOffice Discussion Forums keep a record of our comments. If one person’s not able to be there online, because they are out making a service call, we just drop him or her an email off the discussion board with a link on it and say, ‘We’re discussing such and such topic. Here’s the link. Just stop in when

you are finished with your sales call and make any comments you like.”

Rockwell Technology Group also uses the WebOffice Document Manager, Task Manager and Expense Reports to gain efficiencies.

### **Document Manager — Hold the Coffee!**

Rockwell Technology Group keeps its client proposals, sales literature, and HR documents on the WebOffice Document Manager.

“There are times when we’re not in the office, and we still need to get to our documents,” says Laws. “I remember one time, on the way to an important client meeting, I spilled my coffee all over our proposal for the client. There was no time to drive back to my office, and I didn’t want to have to get to the client’s office, call my home office and ask somebody to fax me another copy that wouldn’t be so presentable either. So, I stopped at the

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### **Task Manager**

Rockwell Technology Group also uses the WebOffice Task Manager extensively for project management. “Our President, John, usually sets up and assigns all the tasks and he’s able to monitor progress online as tasks are completed.”

### **Expense Reports**

To keep track of billable customer hours, the Rockwell Technology Group uses the WebOffice Expense Reports feature. “It works like a time card for each one of our consultants at different client locations.”

“I tell you, we’d get the job done, but we’d be much less efficient without WebOffice. We’ve never tracked exactly how much time it saves us, but when you think about how we have to keep everybody up-to-speed, you can see why WebOffice really saves us time,” Laws concluded.

## **HIGHLIGHTS**

- **WebOffice saves the Rockwell Technology Group both time and money by facilitating the delivery of custom-designed software to Rockwell’s clients via the WebOffice Document Manager.**
- **Rockwell Technology Group keeps all of its client contract information and client profiles — information about client hardware and software — on the WebEx WebOffice Database Manager for easy access, anywhere, anytime.**
- **The WebOffice Database Manager Activity Log helps Rockwell facilitate a seamless progression for customer service and call back activities.**
- **The WebOffice Discussion Forums allow Rockwell employees to hold ‘discussions’ remotely — eliminating a lot of travel time for meetings.**

