Salesforce adoption soars at Fisher & Paykel.

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>
> — **Shireen Cowie,**
> Salesforce System Administrator, Fisher & PaykelFisher & Paykel

Overview

Fisher & Paykel, a global premium appliance designer and manufacturer based in New Zealand, transformed its B2B sales team by building a custom sales app with Skuid and Salesforce.

Challenge

In the spring of 2013, the sales excellence team at Fisher & Paykel faced a complex problem: the sales team was using several disconnected systems to track their sales activities, resulting in an inefficient and confusing sales process. Each sales person used their own email and calendar services, not connected to a universal customer relationship management (CRM) system, making it impossible for managers to track partner sales.

Fisher & Paykel wanted a single solution to manage both inventory and sales processes. They researched CRM products, and decided to buy Salesforce because of its robust data-management capabilities. Anthony Belsham, head of global sales excellence, led the Salesforce implementation. However, he quickly realized that the standard Salesforce® processes didn't fit the way Fisher & Paykel's sales reps worked.

Anthony wanted to make advanced customizations, creating an app that would meet the team's needs. Fisher & Paykel developers started building their own custom applications in Visualforce, but the solution wasn't scalable. Delivering a custom sales app from code would have required hiring a team of developers solely for this project.

Results

6 weeks

For Fisher & Paykel to create a custom CPQ system from scratch

Solution

Even though he was advised to stick with the standard user interface, Anthony knew there had to be a better way to extend the UI without writing code. That's when he heard about Skuid,® a code-free app that lets users customize their Salesforce user experience in real time. He looked Skuid up on the Salesforce® AppExchange and installed a free trial. He built a prototype to demo to his team in a matter of days, and they were sold.

Fisher & Paykel's global sales excellence team worked in tandem with developers to create an app that put data at the fingertips of their reps. Through the app, reps can now see customers insights in a single view, updated in real time from their

back-end distribution database. The company's developers even integrated Skuid with Drawloop® so reps can easily generate content to use in sales conversations to enable business outcomes with customers. As the development team became more familiar with Skuid, they started thinking of other problems Skuid could help them solve.

Instead of their sales team handing out paper surveys at training sessions, they built a survey app with Skuid that seamlessly integrates with Salesforce. Now, their reps can open their iPad and see notes and survey results within the account.

The team also created their own configure price quote (CPQ) app, where reps can generate, review, and approve a quote, and also send a document out for signature—all from one screen.

"They had no idea what they wanted the CPQ system to look like," says Shireen Cowie, Salesforce® system administrator at Fisher & Paykel. "Skuid helped us put a prototype together fairly quickly, and we were able to iterate instantly. The app went from prototype to testing to deployment in just six weeks!"

Fisher & Paykel even used Skuid to enhance internal communications with a souped up version of the Salesforce® Chatter feature. This allows them to use Chatter in ways that standard Salesforce wouldn't allow, further uniting different groups of employees in one place.

"There are multiple applications out there that we could've just installed out of the box to do the work for us, but we loved that Skuid allowed us to use the applications we started with and build based around that without having to add multiple vendors and multiple applications to Salesforce," Shireen says.

Results

Fisher & Paykel has achieved strong adoption among its sales reps since they launched their Skuid app in 2013. Because the sales team captures useful data, Fisher & Paykel's management team now has information that can be used to make strategic decisions, and sales reps have the tools to turn leads into customers.

Skuid has enabled Fisher & Paykel's development team to be agile, continually challenging and improving the interface. Today, the development team works with the global sales excellence team to creatively meet user needs.

"Skuid has allowed us to take a truly agile approach to interface development and respond to our users' requirements," says Adrian Watt, global commercial messaging manager at Fisher & Paykel. "It has allowed us to do things with Salesforce that we wouldn't have been able to do with the standard interface and without the cost—both time and money—of developing a custom app."

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— **Adrian Watt**
Global Commercial Messaging
Manager, Fisher & Paykel

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