



Copyright: Crem Solutions

CREM SOLUTIONS BUILDS STURDY PROCESSES WITH SOLUTIONS FROM SALESFORCE



COMPANY

Crem Solutions |
Software provider for
commercial real
estate management



SOLUTIONS:

Sales Cloud
Service Cloud
Community
Cloud



OUTCOMES:

- Offer creation
time cut to 1 min
- Messaging tool
- Quoting tool

Crem Solutions: A Company Built on Innovation

Innovation is at the foundation of Crem Solutions' business model. After four decades of being in the real estate software business, acquired by the Nemetschek Group in 1998, and almost tripling its team size over the last eight years—Crem Solutions is always reinventing itself to adapt to the fast-changing world of the real estate industry.

The leading real estate software company builds powerful tech solutions to facilitate commercial and technical real estate management for the German real estate industry. Their main offerings are branched under two verticals: product and service.

They provide licenses for iX-Haus and iX-Haus Plus IHS software products. These tools are primarily targeted for the real estate property managers to help them manage their commercial properties. On the service side, Crem Solutions offers support services for their software, support hours, and consulting services.

CREM SOLUTIONS AT A GLANCE:

Established: 1982

Team size:

80 employees

Products:

iX-Haus & iX-Haus
Plus IHS

For the last 39 years, Crem Solutions has been providing property management solutions for a long list of clientele ranging from housing companies, corporate real estate management companies, and smart buildings. Their acquisition into the Nemetschek Group in 1998 has further fueled their growth and has helped them expand their footprint in the real estate market.

The company currently serves around 1100 customers in Germany and provides software licenses as well as consulting services to clients primarily concerning IT-supported real estate management.

A big part of the everyday operations inside Crem Solutions' Ratingen-based headquarters is sending price quotes to prospective customers who seek their expert advice to manage their commercial properties. On average, Crem Solutions sends around 1500 quotes to prospects each year.

Crem Solutions Wanted Efficient Processes to Keep Up With Its Fast Growth

Owing to their rapid growth, Crem Solutions wanted to notch up its spirit of innovation and offer a delightful experience for their internal customers, i.e., their own employees.

Their back-office team—for example—was using Microsoft Word to design quote templates and creating offers and customer contracts by hand. Before adopting Salesforce as a solution, it took Crem Solutions employees 20 times longer to create one quote out of all the 15–20 quotes they had to send everyday. Crem Solutions wanted to put a stop to this kind of manual work and replace them with efficient tools and processes also because it was starting to take a toll on its employees.

“At one point in time,” recalls Philipp Spitz, Head of Marketing and Communications at Crem Solutions, “we had two colleagues whose job was to only write offers and quotes for customers. That made us rethink the entire process and to create a new one.”

“It was a very hands-on collaboration. It was super easy for us to just make a phone call, drop an email, or directly contact someone from Cloudideas whenever we had a question or a problem.”

– Philipp Spitz, Head of Marketing and Communications



Cloudideas Gets a Foot in the Door

Around the same time when the Crem Solutions team was looking for ways to automate their internal processes, they happened to attend the Munich edition of the Dreamforce conference—the annual Salesforce event that draws huge crowds from all over the world.

The Crem Solutions team spoke to a Salesforce account manager who highly recommended Cloudideas to help them implement Salesforce solutions. The Crem Solutions team set up an initial meeting with Cloudideas, liked the solutions they suggested, and decided to rope them in for the Salesforce project.

During one of their early meetings, Cloudideas introduced the Customer Community to the Crem Solutions team. They saw the benefits of introducing it to their customers who could track their cases in real-time—which saved time for the customers as well as Crem Solutions’ support agents.

According to Spitz, Cloudideas worked very closely with the Crem Solutions team in each stage of the project. The decision to choose Cloudideas as their Salesforce partner paid off because the Cloudideas team were engaged throughout the implementation process and responded quickly to Crem Solutions’ queries with delays.

The Crem Solutions team was extremely happy with the outcomes because all the projects that Cloudideas implemented for them were first tested in a sandbox environment and worked without any technical hiccups.

Crem Solutions Gets Its House in Order With Salesforce

Customer Community was one of the many Salesforce projects that Cloudideas helped implement at Crem Solutions. The Salesforce partner agency/company also implemented Sales Cloud, Service Cloud, and a host of smaller integrations for Crem Solutions.

For the Sales Cloud project, Cloudideas programmed a solution for the Crem Solutions team to generate personalized quotes for customers. They built a new custom object on top of the Opportunity Split feature to track new business opportunities and calculate the revenue per opportunity.

Here's how the feature works. When the Crem Solutions team creates a special object named "Mandato," it lets them track all the information under that object and change it when the customer information changes.

The quoting tool allowed the back-office team at Crem Solutions to create different kinds of quotes using one type of opportunity in Salesforce. For instance, it enables them to offer a variety of discounts for customers and organize their products into different categories for customers to choose from.

Cloudideas worked together with Crem Solutions to create a messaging tool that allowed Crem Solutions' backend team to send quotes directly to the customers. Earlier, the Crem Solutions team used to create a PDF document, download it manually, and attach the document to their email or Salesforce dashboard.

With the new solutions that Cloudideas built for them, the Crem Solutions team could now put everything together in one step. They just had to open the email app and the PDF was automatically attached to the email message—removing the manual hassles in between.

Similarly, Crem Solutions created an internal approval process with the help of Cloudideas. The custom-designed approval process kicked in if a salesperson wanted to give a discount to a customer. This use case allowed the head of sales at Crem Solutions to either approve or reject an approval request and increase their sales conversions while not losing their margin on products.

“We prefer partnerships that are very hands-on and quick, and less bureaucratic at the same time. We don’t like working with companies that require us to write long emails. The team at Cloudideas is just that. If I know of a company that is looking for a Salesforce partner, of course I would recommend Cloudideas.”

- Philipp Spitz,
Head of Marketing
and
Communications

More recently, Cloudideas built a “Smart-Edit” opportunity tool for Crem Solutions to allow their team to change or sort the order of new sales opportunities using a drag-and-drop interface. The Smart-Edit tool allows Crem Solutions to include more product information such as description, discount, or category and give more context to the customers’ evaluating a purchase.

For Service Cloud, Cloudideas implemented a variety of new solutions. They created a case tracking solution, for example, to let Crem Solutions customers keep a tab on their case status while hiding special fields from them that were necessary for Crem Solutions’ internal documentation purposes. The solution had an element of playfulness built into it. For example, once a customer closed a case, they received a congratulatory message with confetti flying all over their screen!

Cloudideas also integrated Service Cloud with Dropbox to help Crem Solutions display explainer YouTube videos to their existing customers.

Cloudideas implemented two service modules for the Service Cloud implementation, i.e., email-to-case and web-to-case solutions. When a customer sends an email to the Crem Solutions’ support team, the new modules automatically add the email as a new case to the Service Cloud. The support team can reply to the customer from within the Salesforce console without having to check their email app.

Apart from the product implementations, Cloudideas consulted Crem Solutions on how to create data tables, make the most of the Salesforce reporting capabilities, and optimize their sales processes, among several other best practices. Crem Solutions now uses the Cloudideas-built tables and reports to combine report data and see which partnerships are better for them in terms of revenue.

Cloudideas built the custom integrations for Crem Solutions based on their experience of creating similar smaller integrations for other customers in the past. It’s a fairly common use case among Salesforce customers to have custom quoting tools or building custom objects to make small technical adjustments to fulfill their customer requirements.

With Salesforce as the Sidekick, Crem Solutions Hits Home On All Fronts

Before Salesforce came into the picture, it took days for the Crem Solutions team to complete an offer confirmation process with their customers. They first had to create an offer, send it to the customer as quotes, and wait for the customers to sign it for approval. It was like playing a ping pong game with customers over email which took a long time to complete a simple offer.

After adopting Sales Cloud as their software solution, Crem Solutions slashed the time it took for them to create a quote to under one minute! With Salesforce, they introduced a new offer confirmation process which reduced the customer approval process by a huge margin. Having seen drastic changes in offloading their support traffic, Crem Solutions is contemplating expanding its Service Cloud usage with Cloudideas.

When asked if he would recommend Cloudideas to his colleagues or other companies, Spitz answers in the affirmative.