



Ingersoll Machine Tools Gains Visibility into Sales Performance with GleanView CRM and Analytical Reporting

Situation

As Ingersoll Machine Tools continued to grow, tracking the activity, attribution, and performance of their Sales Team became increasingly difficult. Their internal sales reps were tracking their prospects' and clients' information in various ways that made it difficult for sales management to review pull pipeline reports and track follow-ups on open orders and opportunities. With so many different, personalized systems of organization, it was hard to find a CRM solution that could work for diverse user types, from the tech-savvy to pen-and-paper lovers.

The lack of reporting and analytics was hurting efficiency and proper management of their sales force. They needed a streamlined process and a singular system that allowed sales to be tracked uniformly throughout the company.

Solution

After speaking with Kolee Hodgson, Sales & Marketing Coordinator at Ingersoll Machine Tools, GleanView isolated the key pain points and laid out a plan to implement solutions for each. GleanView would import Ingersoll's existing contacts and data into the GleanView CRM. The dashboard would be customized to fit Ingersoll's unique buying-cycle analytics, producing the high-level, account-based reporting the leadership team needed, with granular drill-downs into specific prospects. Leadership would also receive alerts based on SLAs regarding quotes not followed up in allotted timeframes and warm marketing contacts with a sales-generated task.

A dedicated Customer Success Manager would help implement not just the system but also the changes to the organization's legacy processes. GleanView additionally provided Ingersoll a tailored training experience, facilitating adaptability by the users. Further, the customer success team provided one-off sales user training for new employees.

Finally, the customer success team also continued to check in with Ingersoll's management and established new training materials and takeaways for future reference.

"Our Sales & Marketing Team now have an easy-to-use CRM solution that helps us generate, track, and manage our leads and sales pipeline more effectively. It helps us take the repetitive, manual work out of the sales process and ensures we stay organized and ahead of our competition."

– Kolee Hodgson, Sales & Marketing Coordinator for Ingersoll Machine Tools

About The Client

INGERSOLL

Machine Tools

Revenue: \$75 million USD

Founded: 1891

Headquarters: Rockford, IL

Products:

- Machine tools
- Milling machines
- Advanced fiber placement machines
- Aerospace manufacturing

Ingersoll Machine Tools, a subsidiary of The Camozzi Group, was founded in 1891 in Rockford, IL by Winthrop Ingersoll when he moved W.R. Eynon & Co. from Cleveland, OH. It acquired contracts from General Electric and, by 1917, was closely involved with wartime production and had a workforce of 600. The company now produces large scale machine tools for use in metal cutting and automated fiber placement.



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Benefits

At no extra cost, GleanView was able to provide Ingersoll a CRM solution that not just gave them insight into their sales team's performance but also helped them effect real change in their organization in the name of efficiency and streamlined processes.

Our Product

GleanView's CRM for Sales and Marketing is a complete solution to managing customer relationships. Our product combines Account Management, Email/Digital Marketing and Advanced Analytics into one powerful, cloud-based platform. Every single customer detail is logged into one central customer database. GleanView enables your team to easily transform this information into deep analytics and insights and equips them with tools and automations needed to turn these insights into valuable customer relationships. Ready to take it for a test drive?

About Us

Prior to GleanView, Founder and CEO Bill Calhoun owned several companies that sold B2B products and services. Over the years, he found that his companies' needs for sales and marketing technology outpaced what the existing CRM marketplace offered. He and his team decided to build their own solution.

We are on a mission to empower sales and marketing teams by providing them with the most comprehensive solution for customer relationship management to be found in one platform.

Our Awards



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