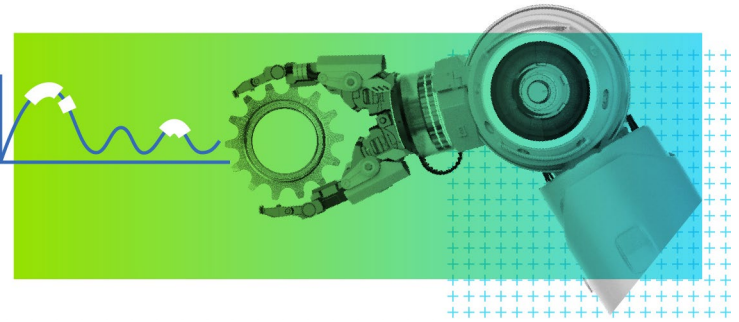# OPENPRISE®

Case study

Teledyne LeCroy uses Openprise to get its 'killer app' to drive post-sale engagement and receives far more in the bargain

Results

✔ Reduced integration cycles between ERP and CRM from 3-4 days to 45 minutes

✔ Created and successfully synced more than 30,000 records in their CRM

✔ Extend the successful post-sale expansion program to the entire business

Complex and fragile integration process

Teledyne LeCroy's strategy for engaging with customers after the sale was relatively simple. A few days before the standard warranty expiration date, the company would send customers a reminder along with an extension offer. The problem was that slow processes and human errors often prevented the notice and accompanying warranty offer from going out on time or at all.

Before Openprise, the company used a point solution to import data from its ERP to its CRM system. The solution, however, was complex, fragile, and dependent on multiple manual steps that were difficult to replicate consistently. What's worse, Teledyne LeCroy had no control over how the manual process was done. What should have been a simple task of syncing contract data (such as sell date, warranty info, product serial number, etc.) took at least three to four days to complete.

Long-term thinking

The previous point solution was no longer tenable for the team leader, Digital Transformation VP Chris Busso. As he recalled, "a weekly file would be generated by our ERP system. Over 3-4 days, this data would be processed manually and written to our CRM. Unfortunately, being a manual process, this was very time-consuming and error-prone". He wanted to optimize the

process and regain control and visibility. The entire process is now fully automated with Openprise. Instead of manually mapping each step like the point solution, all steps of the process are now daisy-chained together and run automatically by Openprise, giving Chris and his team a reliable and transparent way to now complete the same process in roughly 45 minutes. In just a few months into the live implementation, the Openprise solution has already created more than 30,000 new records in Salesforce, with more than half being critical asset data, such as serial numbers, that have been successfully linked to the buyers' records.

Chris likes to think big and he wanted a long-term solution to the many improvements that he had in mind for digital transformation. This integration was a perfect way to showcase what he can do with Openprise. While Chris and his team still run the job once a week out of habit, they could easily execute it daily or extend it to other CRM workflows. As Chris noted, "we could do it now in near real-time, send an email when the product ships, and continue to provide timely engagement with our customers to raise satisfaction." There's really no limit to how the company can use this flexible platform, and the team is looking forward to "bringing it in for all the business units."

A platform with benefits: enabling a serious approach to data deduplication and other essential data quality issues

With the POC and live implementation in the rear mirror, Chris and his team are now looking at the rest of their punch list to see where else Openprise can replace other manual and inefficient processes or solutions. One area of need common to many ops teams is overall account and lead data quality. Duplicate data in particular is a significant issue, especially as the company has grown through acquisitions and migrated its home-grown CRMs to Salesforce. Chris acknowledges that postponing the project to tackle serious deduplication and data quality issues has become a running joke within ops, something to tackle in a "phase b" but never actually gets off the ground. But with Openprise, he believes he now has the right platform and support to not only start but also successfully complete its data quality effort, along with many other data automation projects.

> "I chose Openprise because I like to think long term -- not just about solving one urgent problem. Openprise is so powerful and flexible that I can think of many use cases where it can help: from data deduplication and standardization to merging data after an acquisition."
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> Chris Busso, VP of digital transformation, Teledyne LeCroy

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About Openprise
Openprise is a leader in RevOps data automation, helping companies accelerate their funnel conversions and drive efficient revenue growth. We pioneered the first end-to-end, no-code RevOps Data Automation Cloud to enable even non-programmers to leverage customer data and automate processes, aligning marketing, sales, and customer success teams and their RevOps architecture to deliver on the promise of fast and efficient revenue growth. Revenue leaders from Clari, Zendesk, Zscaler, and Okta depend on us to increase conversions, accelerate funnel velocity, respond faster to changes in their market, and drive funnel transparency and predictable revenue. To learn more, visit www.openprisetech.com and follow us on LinkedIn, Twitter, and Facebook.