



PRECIPART

# Infor CRM and Birst - Precision Software Components for Precipart

## CHALLENGE

Implement a new ERP, CRM and BI solution from Infor while migrating data from three disparate systems.

## SOLUTION

Precipart selected Syncsite as its CRM business partner. Syncsite had successfully integrated XA ERP with Infor CRM for other clients, and brought their skills, experience and expertise to this implementation.

## RESULTS

Three business units now work as one as order data flows in real time from the ERP to CRM and BI solutions, ensuring everyone has access to the latest information. Automated communications keep customers apprised of their order's status. Communication is streamlined, boosting service levels across the enterprise.



Precipart brings over 65 years of accumulated experience, expertise, and proven performance to our global network of medical, aerospace and industrial customers and partners. Since we opened our doors in the United States in 1950, we have developed new processes, methods and services to provide the highest precision gears and mechanical components, working directly with our partners to enhance their competitiveness in a global market. With locations in the U.S., Switzerland, U.K. and India, as well as a rich network of worldwide strategic partners, Precipart has the global reach and expertise to create custom solutions for the most challenging technological applications.

**Below is our interview with Robert Field, Director of Global Digital Solutions.**

**Q: Briefly describe Precipart and your role there.**

**A:** Precipart is a global company engaged in the engineering, design and manufacture of high precision custom solutions. As chief technologist at Precipart, Robert and his team are responsible for both the vision and execution of a Digital Transformation strategy that will enable exponential growth for the company.

**Q: Precipart is a leader in the industry; what do you attribute that to?**

**A:** Market leaders seek out Precipart for the engineering and manufacturing solutions that enable innovation. Our engineers and production team members move science and technology forward in a way that greatly improves people's lives.

- **Client**  
Precipart
- **Industry**  
Manufacturing
- **Headquarters**  
Farmingdale, New York
- **System**  
Infor CRM™, Infor Birst

**Q: What was the impetus for the move to a CRM?**

**A:** We wanted to move from multiple outdated systems to a single, modern platform that would harmonize the enterprise across our global locations and help our sales team be more agile.

**Q: Did you evaluate other CRM options? If so, which ones?**

**A:** Salesforce.com and Microsoft Dynamics.

**Q: What departmental challenges had you been facing before implementing Infor CRM?**

**A:** One group used a totally different CRM than the other two. Consolidation of data was very difficult until everyone used Infor CRM.

**Q: Describe your business and the challenges and/or goals that triggered the project.**

**A:** Precipart had three separate ERP / CRM systems making it impossible to roll up and share group financial data and information on our global OEM customers. We knew we needed to move to a single scalable solution that would put the right actionable information into the hands of our team members and support continued growth for the company.

**Q: How has productivity improved since using Infor CRM?**

**A:** Bringing our global group onto a common platform has eliminated the need for workarounds. We used to have to update several excel spreadsheets to track lead contact information; customer service had to do double data entry, and monthly reporting was a nightmare. This new streamlined system has increased productivity giving our people back time for

- more -

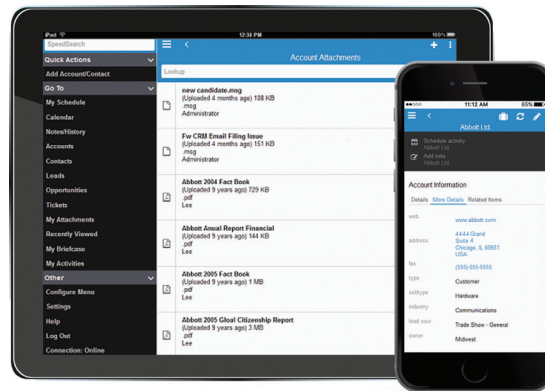


# Infor CRM and Birst - Precision Software Components for Precipart (continued)

higher value tasks that positively affect the business.

**Q: How have Precipart's employees reacted to using Infor CRM and Birst?**

**A:** Precipart team members have wanted a new system for a long time. They have been very engaged in the process and they are happy with the product. They continue to offer feedback, tweaks and opportunities for improvements.



**Q: How has Precipart's management reacted since utilizing Infor CRM and Birst?**

**A:** Management is very pleased with the solutions.

**Q: How much has the ability to access your data from any device and anywhere in the world made an impact to Precipart?**

**A:** A work in progress but has provided for even more collaboration since using Infor CRM.

**Q: How would you describe your experience working with Syncsite?**

**A:** Professional and very positive. They seem to know the product more than anyone else we've worked with. They understand our business and what we need. Syncsite and Guide (ERP partner) were an extension of the Precipart team. We could not have done this without them.

**Q: What processes have improved the most since implementing Infor CRM?**

**A:** More efficiencies from this tool than ever before especially across multiple locations.

**Q: What advice would you give another company about implementing Infor CRM?**

**A:** If you already use Infor ERP, Infor CRM is a no brainer. Make sure to use the tools like Xbar to its fullest and get the most out of the ION integration.

**Q: Would you recommend Syncsite to another Infor CRM prospect?**

**A:** Absolutely.

**Q: What improvements/enhancements would you like to see from Infor CRM?**

**A:** Move from the custom quoting solution built to something that is more robust for quoting custom components (an enhanced CPQ solution).

## About Syncsite

Syncsite is a premier provider of Customer Relationship Management (CRM), Field Service Management (FSM), Business Intelligence (BI) and Marketing Automation (MA) solutions. Syncsite empowers companies in a variety of industries to manage their business data and leverage this information to strengthen customer relationships and enhance profitability.



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## PRECIPART

"Our experience working with Syncsite has been professional and very positive. They seem to know the product more than anyone else we've worked with. They understand our business and what we need and we would absolutely recommend them to anyone."  
Robert Field, Director of Global Digital Solutions

## MORE

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