



## Curtiss-Wright

### CASE STUDY

#### Customer Details

A publicly traded company for over 85 years, Curtiss-Wright leads the way in providing its customers across the globe with innovative products and services for high performance platforms and critical applications. The technologies developed by Curtiss-Wright provide increased safety, reliability and performance in the defense industry.

#### Industry

Aerospace & Defense

#### Avolin Solution

Pivotal CRM

#### Challenges

- Business processes managed manually by spreadsheets, which was time consuming
- Tasks assigned and managed through spreadsheets and Word documents, making it cumbersome and inefficient

#### Key Benefits

- Significant ROI with the integration of customer interactions
- Increase in ROI by integrating tasks and to-dos directly into Pivotal
- Greater efficiencies for the sales team in responding to opportunities and leads

With roots stretching back to Orville and Wilbur Wright, and Glenn Curtiss, the father of naval aviation, Curtiss-Wright is a world-renowned provider of highly engineered, technologically advanced products and services for the commercial, industrial, defense and power sectors. Curtiss-Wright was born from a merger in 1929 between their individual companies, the Curtiss Aeroplane and Motor Company and Wright Aeronautical Corporation, and became the largest aircraft company at the time.

A key part of Curtiss-Wright's vision is its commitment to achieving total quality by meeting its customers expectations and delivering products and services in a timely manner. Curtiss-Wright is known for its long-standing customer relationships, and its company culture has always been highly committed to investing in business solutions, including CRM, which is considered a critical component.

As a result, Curtiss-Wright's Defense Solutions division chose Pivotal CRM to help support its customer focused values.

### Identifying the Initial Challenges

Like many companies, Curtiss-Wright saw the need to implement cost-savings and better efficiencies in handling its customer responses, sales opportunities and task management. Since these processes were handled manually at Curtiss-Wright, they created a drain on employees' time and a barrier to quickly responding to customers. The company looked to Pivotal CRM as a solution to those challenges.

## Solving Problems with Pivotal

Pivotal CRM integrates operations once manually achieved with large Excel spreadsheets or Word documents to a system that enables timely responses to customers as well as streamlined management of leads and tasks across the company.

Pivotal allows users to view contact and company records, see interactions, make notes and send emails or quotes, as well as view any issues or problems. Curtiss-Wright's internal team was able to configure and customize Pivotal themselves after training from Avolin.

Pivotal CRM gives end users the ability to create custom form designs and create reports - basically everything short of actual programming. With its intuitive and easy-to-use nature, it is readily adopted by multiple customer-facing departments within a company that needs access to one system where all customer activity can be quickly found in a single location. Pivotal helps reduce time spent searching for all the pieces of the puzzle, enabling users to provide customer service in a timely manner.

## From Inefficient to Streamlined

Pivotal's key feature is its highly customizable and flexible architecture. It can be personalized right down to the user level, and unique business processes can be captured, created and managed all from within the system. The Power Toolkit is a useful feature when installing Pivotal or customizing it for the first time. It enables users to create new record tables based on individualized needs.

Pivotal contains many different record types - customer, company, opportunity - and allows for the addition of customer pain points directly into the system. Emails are automatically generated and linked back to the customer's issue recorded in the system. This enables immediate response to the customer and does away with numerous spreadsheets where issues are often captured for later review. Timely responses result in large ROI savings company-wide, significantly freeing up users' time for other tasks.

Pivotal also saves valuable time and increases ROI by improving accountability with customized to-do functionality and task management systems. Users can track their tasks in a single location, keeping on top of their workloads and managing great customer relationships without having to work with disparate, unresponsive spreadsheets.

## Productivity Pack Reenergizes CRM Experience

One feature that Curtiss-Wright implemented is the Productivity Pack which "rejuvenated the entire experience within Pivotal," according to Mike Ostendorf, CRM Project Manager at Curtiss-Wright Defense Solutions division. Productivity Pack allows users to create, manage and navigate data faster.

One of the best features of the Productivity Pack, in Ostendorf's opinion, is the E-Template functionality. "On a day to day basis, our focus is on making life easier for the sales team. This is the case with E-Template. Users can create email templates from any record in Pivotal - be it a company, contact, lead or opportunity- with a single click. For example, one of our templates automatically shows what a lead or customer has downloaded from our website. It can also be done with single or multiple records, and the email is automatically linked back to the record," says Ostendorf.

The Productivity Pack also enables opportunities to be integrated with Crystal Reports, allowing users to send quotes in PDF format directly to a customer. Opportunities can be shared via hyperlinks, saving time and removing potential bottlenecks from manual processes. With the Productivity Pack, edits or additions to records can be made to a single record or in bulk, a much needed time saver.

Aside from the huge time savings that companies can realize with the Productivity Pack, the integration of Pivotal with Outlook, and with website and marketing automation tools such as Eloqua, also provides improvements to managing leads. For example, it eliminates the potential for duplicate records and can make the day-to-day lives of sales teams much easier.

“Productivity Pack has saved approximately 25-30% of time, or 1-2 hours per week, for each salesperson.”

**Mike Ostendorf**

CRM Project Manager, Curtiss-Wright Defense Solutions Division

## Achieving a Flexible, Affordable Approach to CRM

Pivotal CRM has helped Curtiss-Wright streamline its business processes, getting rid of cumbersome Excel spreadsheets and time consuming tasks, and replacing them with automation and a unified system. This improves productivity and ensures that customers receive outstanding service, supporting Curtiss-Wright’s reputation for having long-standing customer relationships.

Mike Ostendorf notes that he is always under scrutiny to ensure Curtiss-Wright has the best systems in place, and with Pivotal CRM he knows that is certainly the case. The Pivotal team strives to bring its customers the best possible solution.

If you would like to learn more about Pivotal CRM, email us at [info@avolin.com](mailto:info@avolin.com) or visit [www.avolin.com](http://www.avolin.com).

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The Avolin logo features the word "Avolin" in a bold, sans-serif font. The letter "A" is a dark purple, while the remaining letters "v", "o", "l", "i", "n" are in a lighter purple shade.

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