



**LUBRICATION
ENGINEERS®**

ASSET RELIABILITY SOLUTIONS™

CASE STUDY

Global lubricant solutions provider observes

Zoho CRM's massive impact within six months of implementation

MAJOR RESULTS

Payback period

6 months

Productivity increase

15-25%

Time saved

25%

Cost-benefit ratio

1:10

Customer Profile

Company

Lubrication Engineers

Industry Type

Oil and Energy

No. of Employees

100+

Type of Business

Privately Held

Division

Americas

Features Used

Workflow automation

Email templates

Mobile app

Assignment rules

Custom functions

Blueprints

Zoho app integrations

About Lubrication Engineers

Established in 1951, [Lubrication Engineers](#) (LE) manufactures high-performance lubricants for customers across various industries globally. It focuses on helping customers maximize uptime for their organizations by promoting lubrication reliability programs and minimizing operational challenges.

The company employs 100 people globally, with a manufacturing plant in Wichita, Kansas and a warehouse in Knoxville, Tennessee. Its trained and certified consultants and international distributors provide a range of 2,000 different products to individual customers.

The greater the scope, the better

Until 2017, Lubrication Engineers completely relied on its ERP system to track the business's growth and KPIs. An ERP system simply wasn't capable of offering the company accurate metrics on usage rates, lead conversion rates, and other measures.

The company used Highrise CRM for a while—a CRM system that's limited to contact and task management features. Since it was designed for small businesses, Lubrication Engineers needed a solution with a much bigger scope.

A fortuitous result

Paul Grimes, Chief Operating Officer at LE, handles the task of finding solutions to create value, reduce costs, simplify process complexity, and, ultimately, to turn those into actionable realities that affect the company's bottom line. Lubrication Engineers evaluated several CRM systems, including Salesforce, Goldmine, and SAP CRM.

During this process the company ultimately looked for a solution that ensured the following characteristics:

- Organizational buy-in
- A smooth user interface and a mobile app to access on the go
- Adaptability for unique business needs
- The right cost model

In pursuit of a suitable CRM, Lubrication Engineers stumbled upon [Zoho CRM](#).

A committed Zoho partner

Kevin Chieff of [Soft Skills LLC](#), a Zoho Advanced Partner, was instrumental to the implementation of LE's Zoho system. "We had a dedicated team of six that met twice a week for a year with Kevin Chieff," says Grimes. "Kevin played an essential role as a partner, teaching us and introducing us to features we didn't know existed, and getting us through our business process."

Generating leads from multiple sources via integrations

LE has 70 sales consultants across the USA supporting customers at a local level, combined with approximately 100 employees working remotely or at the Wichita plant location. Outside North America, the company sells products through international distributors. The International Operations Vice President interacts with Zoho CRM on behalf of the 55 distributors, while the sales teams manage 10,000 active customers in Zoho CRM.

Lubrication Engineers generates leads from various sources. By integrating [Zoho Forms](#) and Zoho CRM, the company created forms called "LE Recommends" and "Contact Us" on its website, which bring in a lot of prospective contacts who are directly funneled into CRM.

The integration with [Zoho Bookings](#) accelerates that process, allowing leads to book an appointment with a representative from the company directly.

[SalesIQ](#) has also been actively implemented on LE's website and integrated with CRM. This customer/lead engagement system is a huge benefit to the company, as it receives a minimum of 15 web-chat requests per day. Depending on the query's subject, the customer service team decides to forward it to the sales reps or push the data into CRM. LE finds this integration seamless and effective.

With [Zoho Social](#), leads are generated from Facebook, Twitter, and LinkedIn as well. These leads are captured on CRM, and according to customized assignment rules, are assigned to specific users based on the prospect's region and type.

Using automation to minimize time spent

With a 100% CRM adoption rate, each of LE's sales representatives manages nearly 30 activities on a daily basis—amounting to a total of 1,800+ activities per day across the company. The team leverages automation and uses workflow rules to chase leads and close deals more quickly.

The company has created numerous ready-to-use email templates for sales representatives. These templates also ensure that there's no missing information on the company's side. This means following up with customers isn't just less exhausting for the sales teams—it saves time, too.

Quoting is an important aspect of a sales process. Lubrication Engineers did custom-scripting to the quoting module to manage this particular process by incorporating the company's rules for discounts on products, the time limits on quotes, and more. With this customization, the company has a clear understanding of the purchase orders, and the ability to track them efficiently. The quoting process is covered using the blueprints feature, as well.

LE also utilizes workflow automation effectively with 100+ workflow rules in place. One workflow rule that sales reps find beneficial alerts the user when a quote is close to expiring. The company also understands how important it is to have fun and acknowledges things worth celebrating among day-to-day tasks; for example, when a quote beyond a certain amount is generated for a customer, the system triggers a celebratory email, along with a cowbell sound effect.

Recognizing common customer issues

Using certain blueprints and workflows, tickets are assigned to users based on whether they're customer service or technical issues. In [Zoho Desk](#), LE tracks various metrics, including the following:

- Time spent on tickets
- Returns
- Delivery time
- Invoicing

LE uses these metrics to determine where and why problems most frequently arise so it can prevent them from recurring.

The company also measures customer satisfaction with surveys. By integrating [Zoho Survey](#) with Zoho CRM, the process of collecting responses is never a tedious activity for the team, since surveys are sent to customers via CRM. Once submitted, the surveys are quickly captured in CRM—making it easy to measure customer satisfaction.

LE manages and analyzes data and activities using [Zoho Analytics](#). The main sources for this data include their ERP system, spreadsheets, and a few workspace apps. The company tracks the following metrics through dashboards:

- Revenue
- Velocity and sales rates
- Account retention
- Operational metrics
- Warehouse capacity

The company hadn't implemented a business intelligence tool before Zoho Analytics. After deploying it, Grimes noticed a 25% reduction in time spent on analyzing data. The biggest advantage, according to Grimes, is that the entire organization has access to the same metrics, leaving no room for miscommunication and confusion. Teams have a clear view and understanding of the data, and therefore they're able to strategize and improve certain metrics as needed.

[Zoho Campaigns](#) is the company's core email system within the CRM database. Due to the integration with CRM, the marketing team can identify which customers are interacting with their biweekly newsletter campaigns. After deploying Zoho Campaigns, the company saw a 3% increase in their click-to-open rates as it's targeted at specific segments.

Increased sales

Since 2017, Grimes has seen how implementing and actively using a CRM has benefited the business.

With Zoho CRM in place, the company
observes conversion rates up to

10-20%

The biggest advantage of a CRM from the perspective of a salesperson is the ability to deliver quick responses to the customer—providing what they want, when they want it, and how they want it. The sales team derives value from the Zoho CRM mobile app, too; it’s a convenient way for them to manage prospects and quotes on the go, as most of them meet customers in person.



The entire company has gotten better, faster, and more efficient in supporting customers. We all understand the business better because of the availability of the information that’s being presented.



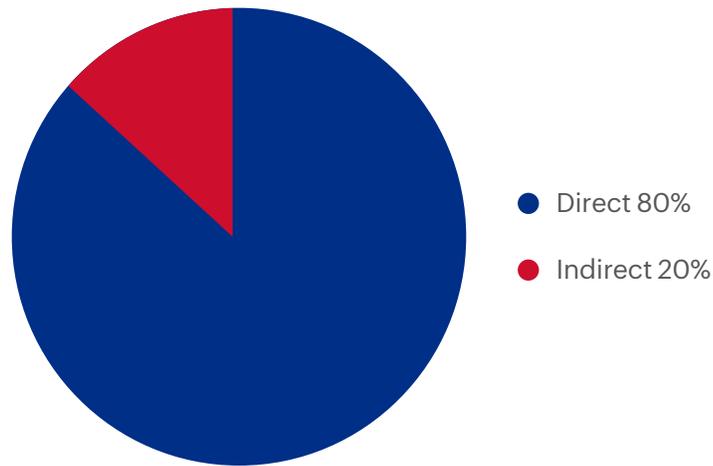
Paul Grimes
Chief Operating Officer

Key benefits

With Zoho CRM’s various integrations, Grimes finds it incredibly easy to understand where the business stands. Being able to articulate that information quickly and clearly represents a huge advantage for making company-level decisions.

LE was able to see Zoho’s impact within six months of implementing the system, making it clear that the legacy systems previously in place were not equipped to handle the company’s unique processes.

Cost: Benefit ratio | **1:10**



Benefits

Grimes notes that the benefits that Zoho has brought to the company represent 10 times the cost of all Zoho licenses purchased.

The benefit Lubrication Engineers gains from Zoho is

10x

the amount spent on Zoho licenses annually

“Our business has grown over the last few years. Zoho has helped us become more efficient and more effective within our current structure of employment. Zoho has increased our internal productive information sharing and capacity as much as 15 to 25%.”

Paul Grimes
Chief Operating Officer

The road ahead with Zoho

Lubrication Engineers is currently working on creating custom modules in Zoho Creator for product development, and plans on integrating them with Zoho CRM, too.

“Zoho continues to modify, adapt, grow, and add things to the platform that our business sees value in. It’s absolutely been a perfect marriage in terms of the ability to adopt new ideas and new concepts to create an ecosystem of apps that talk to each other and operate within our business.”

Paul Grimes
 Chief Operating Officer

Other Zoho Apps integrated with Zoho CRM by Lubrication Engineers to drive its business

Purpose	Product
Lead generation	Zoho Forms, Zoho Bookings, SalesIQ, Zoho Social
Support	Zoho Desk
Business intelligence	Zoho Analytics
Digital signatures	Zoho Sign
Marketing campaigns	Zoho Campaigns
Custom solutions	Zoho Creator
Customer satisfaction	Zoho Survey
Expense management	Zoho Expense