Headworks® INTERNATIONAL

Headworks International

INDUSTRY:
Renewables & Environment

COMPANY SIZE:
51-200 employees

WEBSITE:
www.headworksinternational.com

Imran Jaferey
VP Global Sales

# Headworks International: Precision Targeting of Key Opportunities

Headworks International is a leading wastewater screening equipment manufacturer based out of Houston, Texas with offices in the United Arab Emirates, in India and in Canada.

Headworks is the number one choice among experienced owners, engineers and operators who know that quality construction, innovative design, and low lifecycle costs translate into long-term success for their wastewater screening and screen handling investment. Their dependable wastewater screening equipment operates automatically and with virtually no maintenance in tough and corrosive environments.

The Visual Difference

Headworks' Pipeliner experience began when Imran Jaferey, Headworks Vice President—Global Sales, saw a Pipeliner CRM presentation at one of Pipeliner's Power Breakfasts in Houston. The timing turned out to be perfect as Headworks had become extremely dissatisfied with the CRM they were using at the time.

"We have found that the ease of use with Pipeliner is orders of magnitude better than Salesforce, the CRM we had before," Jaferey explains. "The clarity of data and how easily visible it is has made a huge difference in our process. It's much easier to target key opportunities, instead of trying to sort through tables and tables of data. The visual representation was probably the biggest selling point for Pipeliner as far as I was concerned."
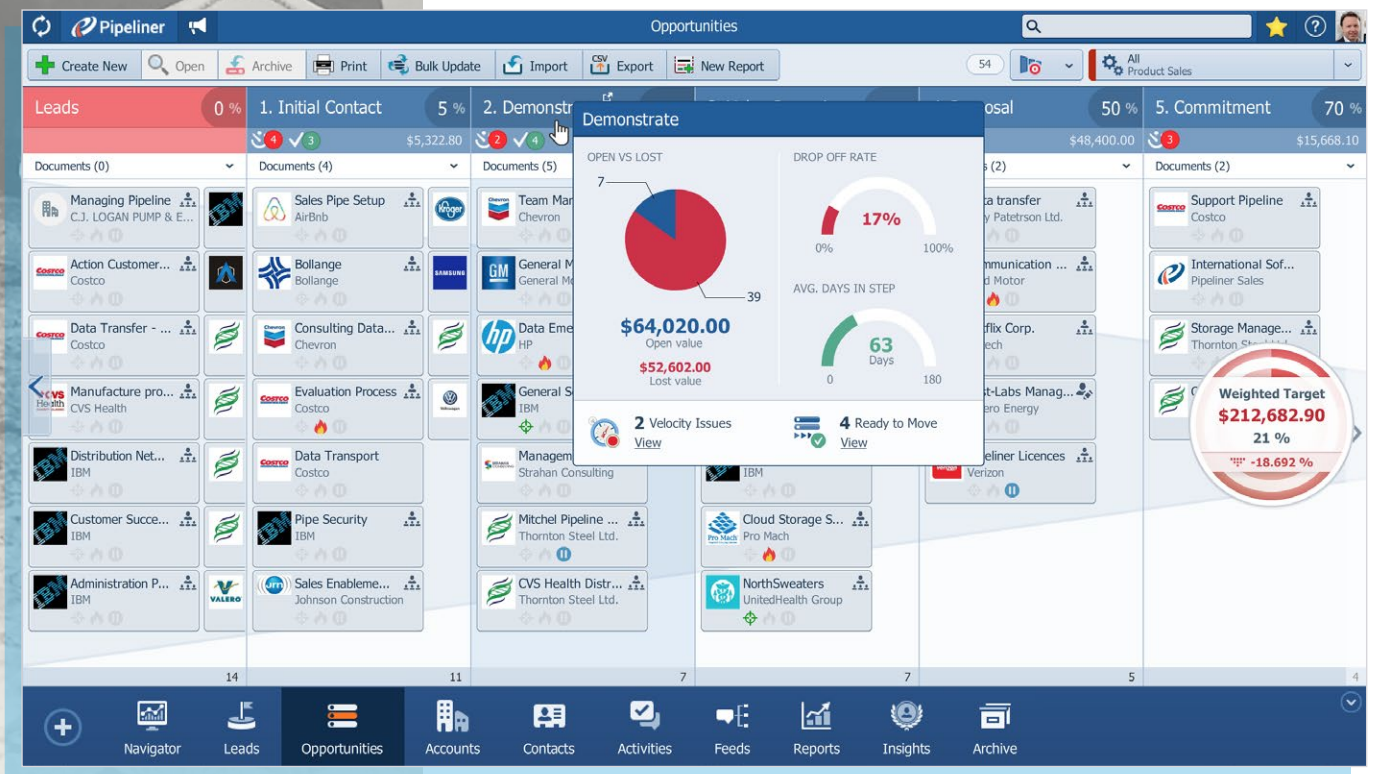
"Our sales team all say that they find it useful to manage their sales process, whereas before they saw the CRM as a tool that the management team used to get information out of them. Now they get more out of it."

Reporting

Jaferey found another major leap forward was with Pipeliner's powerful reporting features. He says, "One of the biggest frustrations I had with Salesforce was when you're trying to run a report, you're really restricted in what you can get. You get a table out, then have to bring it into Excel and manipulate it there. If you want to look at your forecast in a graphical manner, you've got to bring it into a different software and manipulate it."

This has not been the case with Pipeliner, and Jaferey cites Pipeliner's Bubble Chart View as a prime example.

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> *Pipeliner's Bubble Chart View is incredible. Our projects tend to have a very long sales cycle. For example, just yesterday we finally got the order for a project we started working on back in 2011. With the Bubble Chart View, I can look at stage versus time, and tell if it's been in there too long, or even if it's been too short a time to be advanced. We can target the right size projects, and ignore the tiny ones that are obvious by the size of the bubbles. It's really a powerful tool.*

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Headworks has also found Pipeliner's filtering features extremely useful. "I think being able to set up your own views and filters is fantastic thing," Jaferey says. "You can get an immediate picture of what's happening in your opportunities without having to do a lot of digging."

Multiple Pipelines

"Pipeliner is used to track everything in our sales pipeline—all the leads, opportunities, accounts and contacts," Jaferey explains. "We're very much sticklers for making sure it goes into the system, because if it doesn't exist there, it doesn't exist."

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Pipelines

Currencies

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Pipelines

+ Add New Pipeline

Pipeline Name	Pipeline Color	Steps	Actions
Lead Development	🟧	6 Steps	✏️ 🗑️
New Business Strategies	🟦	6 Steps	✏️ 🗑️
Product Sales	🟥	6 Steps	✏️ 🗑️
Service Sales	🟩	4 Steps	✏️ 🗑️

Pipeline Name
🟧 **Lead Development**
Configure Sales Steps

Steps (6)

1. **Introduction - 5%**
   Velocity 130 days
2. **Implementation - 10%**
   Velocity 77 days
3. **Adoption - 25%**
   Velocity 75 days
4. **Account Growth - 80%**
   Velocity 71 days
5. **Renewal - 90%**
   Velocity 85 days
6. **Advocate - 100%**
   No velocity set

Headworks takes full advantage of Pipeliner CRM's unique multiple pipelines feature. "We also have our project managers using it," Jaferey adds. "Because of the nature of Pipeliner with the way you can set up the stages, we've actually set up something we call an execution pipeline. With most conventional CRMs, once an opportunity becomes an order it would stop being tracked there. But our project managers are using Pipeliner to track the project from PO to delivery and startup as well."

Onboarding and Training

A common complaint about a traditional CRM is the time and expense to get it up and running. Another major Pipeliner benefit is the fact it can be implemented in a fraction of the time and expense of other CRM applications.

"From the day we signed the Pipeliner contract to the day we had the system running, I think it was less than 3 months," Jaferey says. "Now everybody uses it and everybody's comfortable with it. When I implemented Salesforce in my last company, it was close to a year process to get it done.

"One of the challenges we faced in bringing Pipeliner onboard was all the data we were trying to bring over. We made a decision

in the company to bring over everything—all the projects, all the opportunities we had in the system going back 15 years plus. We got the data cleaned up and in the end, the rollout was pretty instantaneous. We worked with the Pipeliner technical team, and they were fantastic."
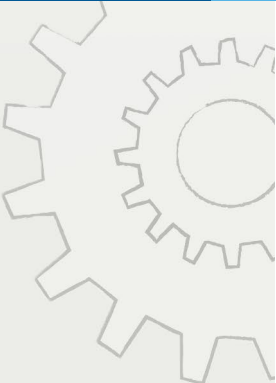
Administration

It isn't uncommon, with traditional CRM applications, to have to train up one or two full time administrators to oversee CRM. This isn't the case with Pipeliner—in fact, administration is part time and requires just a few hours training. And anyone can do it.

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> *With Pipeliner, I don't have to go to IT for help. That was something I was told, but I didn't believe it until I started using it. I'm one of the administrators, and we have two others—one in Sales and one of the senior project managers. We can add fields, modify forms, and do everything needed.*

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"With Salesforce, we had an outside company that we had to pay to make any changes. We've done a fair amount of customization on Pipeliner to make it fit our process, and it's been very easy.

Sales Management Time Slashed

Like many others managing salespeople, Jaferey has found Pipeliner to be an enormous time saver. "Pipeliner gives me a lot clearer view into what my team is actually doing," he says. "Because Salesforce was unwieldy, we had a lot of emails flying around. I don't have to deal with that now—I can see when things are moving along the way they should be and when they're not, I can dig into the feeds and see what activity has been happening.

"With Salesforce pipeline reviews with my sales guys took a couple of hours, and because of that we didn't do them that often.

Now every 2 weeks we have a half hour phone call, we can hit on all the key activities and opportunities, and everybody's on the same page."

Going Mobile

Salespeople are rarely chained to desks, which means that mobile CRM is a crucial part of their lives. For Headworks, Pipeliner has excelled in this area, too.

"We're all on iPhones here, and the Pipeliner iPhone app has been tremendous," Jaferey reports. "I'm actually at a trade show right now, and as I talk to somebody and get information I just enter it then. I don't have to sit in the hotel room for an hour tonight entering all this information. I can just enter it then when it's fresh.

"There was a guy I was speaking with a couple of hours ago. I entered his information into Pipeliner and created an activity for my Marketing Manager to send some information to them. I saw him wandering around the hall like 15 minutes ago and he said, 'By the way, you work really fast.' I asked him what he meant and he said, 'I already got an email with all the case studies and stuff you said you were going to send. I've already forwarded it to my engineers.'

"Every day, every hour you wait, that lead gets staler. So getting it responded to and moving forward immediately is critical. I like that and the sales guys like that, too, that they can just enter the notes and get things done."

Opportunity Focus is Key

Overall, Headworks loves the focus that Pipeliner has brought to their sales efforts. "Pipeliner CRM allows us to focus our efforts on the projects we're really going to close," Jaferey concludes. "We get a lot of opportunities, and historically the qualification process would take too long. We'd end up spending more time on an opportunity than we should have, and ignoring the ones that we could really close effectively. That doesn't happen anymore."
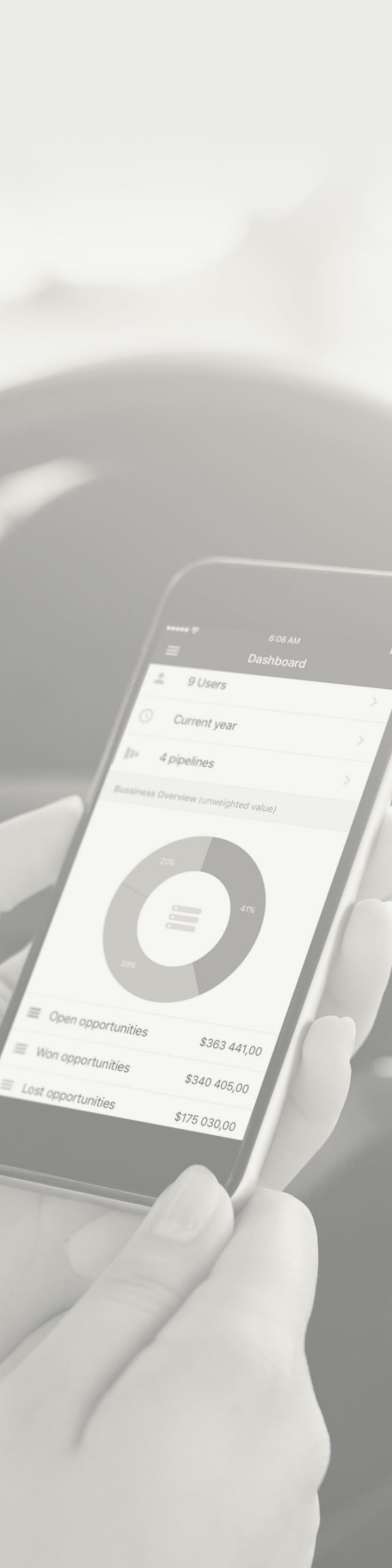
Pipeliner CRM – It's All About Sales!

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