

Customer Operations Visibility with Salesforce

About REGO-FIX USA

REGO-FIX is a Swiss manufacturer of premium tool holding systems. Their holistic tool holding systems support manufacturers in aerospace, automotive, medical, watchmaking, mold and die, and machine tool industries who are looking for solutions with extraordinary reliability, high precision, and outstanding quality.

Customer Challenge

REGO-FIX USA needed to upgrade and connect its sales, marketing, and service platforms. Their siloed systems and databases made it difficult to create a single source of truth for customer operations. They wanted to create a centralized system to manage tests, trials, and cases that all tied back to their CRM records.

Results + Ongoing Innovation

Post-implementation, data integrity is stronger across the board, giving the REGO-FIX team more confidence and success in their customer outreach and management. With automated record transfers between Macola and Quoteworks into Salesforce, they're saving time and gaining more insight into their customer relationships. Now, when customers call or log a request, it's easy for employees from any team or department to see their history and serve them quickly and efficiently. Going forward, their focus is on optimizing Pardot and Sales Cloud to adopt best practices and do even more with their data to grow their business.

*The results so far have been impressive. **We're seeing greater efficiency, visibility, and accountability**, which is critical for maintaining strong customer relationships and identifying ongoing development opportunities. NuAge Experts has put us on the road to digital transformation, and we're excited about the possibilities ahead.*

REGO-FIX

NUAGE EXPERTS SUCCESS STORY

Products: *Sales Cloud, Pardot*

CRM Replaced: *Goldmine*

3rd Party Integrations: *Quoteworks, Macola*



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