GEBERIT

CASE STUDY

Fully automated document generation & delivery processes across multiple business areas

ABOUT

Geberit is a leading global player in the sanitary sector, with a presence in 50 countries and a workforce of over 11,500 employees. The company's headquarters are situated in Rapperswil-Jona, Switzerland.

CHALLENGE

Geberit faced a daunting challenge when their in-house developed marketing solution reached its limits as the company grew. They needed to send letters, brochures and other documents to a large number of customers via partners and fulfillment centers, which required an elaborate multi-level distribution system.

SOLUTION

The ideal solution: DocumentsCorePack as an integral part of their company-wide Dynamics 365 CE setup to meet their high document generation and automation requirements. DocumentsCorePack was integrated into 3 cross-divisional business processes:

01 ▶ Automation of the entire marketing document generation process

By leveraging the power of DocumentsCorePack, Geberit achieved fully automated document generation with a single One-Click-Action. They seamlessly integrated this feature with a cross-entity letter activity, allowing them to start a fully automated generation process with a workflow behind it. The process begins with the first data record and ends with the delivery of the finished document to a fulfillment center for printing, all with just one click.

02 ▶ Customized templates that meet department-specific requirements

As a result of the success of DocumentsCorePack in their marketing department, the solution was gradually implemented in other areas of the company. The user-friendly Template Designer made it easy for every business user to address regional economic and legal requirements for documents, generating and automating individually suitable documents for a wide range of applications. This significantly reduced the daily work-load and streamlined data-driven business document generation.

03 ▶ Automated brochure ordering process via the website

In order to further enhance their customer's ordering process for print products like brochures and catalogs from their website, Geberit has implemented the advanced capabilities of the DocumentsCorePack Connector. By integrating it into a Flow in Power Automate, the previously time-consuming and manual task of processing orders has now become fully automated. This implementation has led to significant time and cost savings and greatly reduced manual errors.

CONCLUSION

In conclusion, DocumentsCorePack's powerful features, such as One-Click-Actions, Template Designer and the Connector, enabled Geberit to create fully automated business processes across three different application areas. By implementing this innovative solution, Geberit has saved precious time, money and valuable resources while improving the efficiency of their marketing and document generation activities.

Are you ready to revolutionize the way you handle your documents too?

> ❯ **START YOUR 14-DAYS FREE TRIAL!** | All features and support included

❝ I am absolutely thrilled about the amazing capabilities of DocumentsCorePack that have made our document-heavy business processes a breeze to manage. What's more, the outstanding support provided by the team at mscrm-addons has been truly exceptional, and I haven't come across any other service provider that offers such top-notch assistance. Overall, my experience with DocumentsCorePack has been nothing short of remarkable, and I couldn't be happier with the results it has delivered. ❞

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