

Customer story

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## How Persistent helped Cotherm to enhance its customer relationship and strengthen its positioning using Salesforce

We compared proposals from 4 different Salesforce integrators: we chose Persistent Systems, because, right from their first presentation, they showed that they are real specialists in implementing the Salesforce CRM tool. Their offer was well-structured and well-defined, in terms of timescales and budget. Their estimate for project completion was accurate, and they delivered on all their commitments.



**Thierry Camillieri**  
Cotherm General Manager

## Key numbers:

**1948:** creation of Cotherm

**800** employees

An office in France, a subsidiary in the United Kingdom and one in the United States

Two production plants in France and one in Tunisia

More than **11 million** thermostats sold per year

**39M€** turnover in 2021

## The client

Cotherm is a French company that designs and produces smart, connected thermostats to reduce CO2 emissions and optimize energy consumption, by regulating water and air temperatures depending on the ambient conditions and requirements.

Founded in 1948 in Grenoble, the company is a market leader in temperature and energy management solutions, and has focused on research and innovation to adapt to a constantly changing market, especially given the advent of smart grids. These intelligent networks enable us to save money and protect our resources and the environment by monitoring electricity production and consumption in real time.

Cotherm has two foreign subsidiaries, in the UK and the USA, as well as a second production plant in Tunisia and a highly customer-centric sales force on the ground. Thanks to a large number of partnerships and joint ventures, Cotherm works with leading original equipment manufacturers worldwide: the company achieves 80% of its turnover abroad and sells more than 11 million products per year.

For more information: <https://www.cotherm.com/en>

## Key facts



**Duration**

**6**  
months



**Licences**

**40**  
users



**Integrations**

Infor® M3 ERP

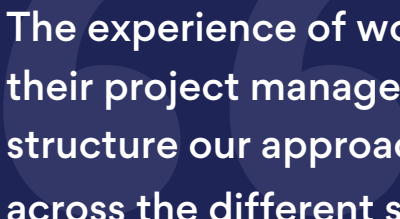


**Products**

Sales Cloud and  
Community Cloud



[www.cotherm.com](https://www.cotherm.com)



The experience of working with Persistent Systems was very positive, their project manager was focused and organized. He really helped us structure our approach to opportunity management and harmonize it across the different subsidiaries.

Thierry Camillieri  
Cotherm General Manager

## The challenge

Cotherm's customers are HVAC system manufacturers from all over the world: renowned producers of water heaters, boilers, heat pumps and electric radiators, but also saunas, spas, etc. In a constantly and rapidly changing energy market, there are many challenges: contributing to decarbonization, addressing new regulatory requirements, meeting consumer expectations in terms of energy prices and performance, and foreseeing trends and technological advances.

In this kind of context, Cotherm's role goes far beyond sales: thanks to its expertise and know-how, the company provides support and advice to its customers long-term. Sales cycles are usually very long, as there are many stages before the thermostats come on to the market: product specification, prototyping, testing and ultimately manufacturing.

In December 2020, when Cotherm decided to change its CRM tool, the objective was very specific: to provide its clients with flawless service and to communicate better and faster. To do so, the company wanted to equip its headquarters, two subsidiaries and remote sales force with Salesforce's Sales Cloud tool. The purpose of this was to harmonize data, consolidate customer relations and simplify data access and input for staff in the field.

Cotherm consulted several integrators. Out of the 4 they received, the firm chose Persistent Systems' proposal, as it was more comprehensive in terms of timescales, budget and project approach, in line with the realities of a medium-sized business such as Cotherm.

## The solution

Prior to Persistent Systems, Cotherm used IBM Lotus Notes, which only enabled storage of customer and prospect information and email exchanges. The Vinay headquarters and two foreign subsidiaries had each been operating with different processes and methods. This resulted in wasted energy in terms of managing and updating contacts and follow-up actions.

The project started with workshops where, among other things, Persistent could advise Cotherm staff and share useful recommendations on managing accounts and potential leads.

Salesforce's Sales Cloud was therefore installed and integrated with Infor's M3 ERP. The new CRM enables complete and cross-functional account and opportunity management: customer history, key contacts, interactions, related internal discussions, etc. Everything is centralized, secure and accessible by the sales force in the field as well as by the Cotherm offices in the different countries: France, the United Kingdom and the United States.

## The results

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The implementation of Sales Cloud has enabled Cotherm to achieve a double objective: not only improving interactions with its customers around the world, but also streamlining the work of its employees.

- \\ **Opportunity management is structured:** Cotherm staff have collaborative access to the details and history of each event and interaction. It is now possible to check the status of a project, the source of the lead, the prototypes that have been produced... as well as information on the sales cycle thanks to detailed reports that are updated in real time.
- \\ **Communication is more relevant:** The new contact management structure makes it easier to target the right people: purchasing, R&D, management, marketing, etc. Cotherm's personnel can provide the relevant information to the appropriate person, improving the working relationship and strengthening Cotherm's position as a specialist in the thermal regulation market.
- \\ **Data is finally secure and easily accessible:** the different teams manage contacts in a structured manner, data is stored in Sales Cloud, and those who access it - including the sales force in the field - know they can count on data being up-to-date at all times, which is essential in a long-term OEM relationship.

The project was carried out within the budget and timescales indicated by Persistent Systems at the outset.

## Next steps

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Following on from this first successful joint venture between Cotherm and Persistent Systems, a new roadmap for 2022 has already been drawn up and is underway. It involves implementing **Pardot**, Salesforce's marketing campaign automation solution.

We are very satisfied with our relationship with Persistent, one of our trusted partners for 18 years. As a Platinum Salesforce partner, Persistent works alongside us to contribute to our customers' success.



**Leon Mangan**  
Salesforce SVP Alliances et Channels  
EMEA & LATAM

## Skills & Certifications

Management of complex multi-cloud projects. More than 600 certifications (Feb. 2022), including: FSL, CPQ, Marketing Cloud, Pardot, B2B Commerce, Tableau, Heroku and Mulesoft.

### About Persistent

With 16,000+ employees around the world, Persistent Systems is a global solutions leader delivering digital business acceleration, enterprise modernization, and next-generation product engineering.

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