

**CASE STUDY**

# Efficient process optimization and digital transformation at TK Energy GmbH

In the age of digitalization, companies find themselves faced with the challenge of optimizing their processes while also remaining flexible and competitive. This case study shows how TK Energy GmbH was able to achieve significant efficiency gains and optimize processes by implementing the contract management solution proCONTRACTS for Microsoft Dynamics 365 in combination with the CRM system. Collaboration with the provider **CRMFIRST** resulted in a centralized and automated solution that simplified workflows and significantly reduced the error rate.



## Who is TK Energy GmbH?

TK Energy GmbH is a leader in the field of photovoltaics, specializing in the development, planning and operation of solar power systems. TK Energy, based in Königswinter, Germany, focuses on the installation and operation of solar systems on commercially used roof surfaces to generate solar green electricity.



### Starting point

The company was faced with numerous inefficient and fragmented processes. Various tools were used for different steps in the process, which made it difficult to understand, especially for new employees. This led to system crashes and the need for additional manual work, a high error rate and a cumbersome workflow. In addition, there was a lack of a comprehensive view of customer data, which made it difficult to manage and track contracts.

## **Actual state before implementation**

- ➔ **Using multiple tools for different tasks:** This led to inconsistencies in data and inefficient workflows.
- ➔ **High complexity and long onboarding period for new employees:** New employees struggled to navigate the complex and fragmented processes.
- ➔ **Frequent errors and inconsistencies in data:** Manual processes and various tools increased the potential for errors.
- ➔ **No overview of customer data:** There was no centralized system for managing customer data.
- ➔ **Need for manual data transfer due to system crashes:** Different tools required multiple entries of data and caused additional work in evaluations, which impaired efficiency in customer care.

The company recognized the need for a centralized system to simplify processes and increase efficiency. In order to meet the growing requirements and increasing demand in the renewable energy sector, it was particularly important to reduce the error rate and improve workflows.

## **Implementation objectives**

The primary objective was to introduce a centralized tool that would consolidate the various work processes, thus reducing the error rate and increasing efficiency. Other objectives were:

- ➔ Improve onboarding of new employees through simplified processes
- ➔ Increase the company's overall capacity
- ➔ Minimize dependence on paper-based and manual processes
- ➔ Automate and centralize data management

- ➔ Create a comprehensive overview of all customer data and contracts
- ➔ Introduce a customer relationship management system
- ➔ Introduce a system for a 360-degree view and improved customer care



As a result of implementing proCONTRACTS for Microsoft Dynamics 365, we were able to replace the isolated solutions we had previously used, and digitize and automate our processes. This has enabled us to achieve a significant increase in efficiency in project management and to optimize customer care.

KAI LAUTERJUNG, TK ENERGY CEO



## Choosing and collaborating with CRMFIRST

After a thorough analysis and evaluation of several providers, the company chose to work with **CRMFIRST**. **CRMFIRST** demonstrated its outstanding technical and professional expertise in Microsoft Dynamics 365 as well as its specially developed contract management solution proCONTRACTS for Microsoft Dynamics 365. This solution was not only characterized by a high degree of coverage with regard to the requirements of TK Energy, but also by its adaptability, flexibility and scalability. **CRMFIRST** was very agile and fast during the implementation process, especially compared to previous system launches.



## The benefits of working with CRMFIRST

- ➔ **Understanding the requirements and complexity of the tools and processes in use:** An initial requirements and analysis workshop helped **CRMFIRST** gain a comprehensive understanding of TK Energy's current situation. It became clear that the various isolated solutions are difficult to manage and represent an obstacle to further growth.
- ➔ **Competent advice:** Based on the collected requirements, **CRMFIRST** developed an initial sketch for a system that solves the requirements for TK Energy and creates opportunities for further growth.
- ➔ **Solution competence:** **CRMFIRST** has a high level of technical and professional competence for Microsoft Dynamics 365 and also offers in-house developed additional modules such as the contract lifecycle management application proCONTRACTS for Microsoft Dynamics 365. This combination provided us with many processes and functionalities that could be customized to our needs.
- ➔ **Fast response times and high degree of agility:** **CRMFIRST** was able to respond quickly to TK Energy's specific requirements.
- ➔ **Comprehensive customization to the company's specific requirements:** proCONTRACTS for Dynamics 365 was tailored to the specific needs of providers and operators of solar systems and additionally customized for TK Energy.
- ➔ The system should provide **optimal support** for **all users** in their activities and at their workplaces, i.e. provide all information at all times for both internal and mobile project team members working on-site with customers.
- ➔ **Ability to implement complex requirements:** **CRMFIRST** was able to successfully implement even the most demanding and extremely complex requirements.

**CRM**FIRST supported the company in digitizing the existing processes and integrating them into the new CRM system. Particular attention was paid to the conversion of an extensive Excel spreadsheet that had previously been used to manage various processes.



## Implementation process

proCONTRACTS and the CRM system were implemented in a step-by-step, targeted manner. Initially, key processes were identified and prioritized to ensure a smooth transition. The integration of the previous Excel spreadsheets and the automation of the associated tasks were central steps in the implementation process.

### Implementation steps:

- 1** — **NEEDS ANALYSIS**  
Identification of central processes and requirements
- 2** — **PLANNING**  
Creation of a detailed implementation plan with clear milestones.
- 3** — **INTEGRATION**  
Transfer of existing data and processes to the new system.
- 4** — **TRAINING**  
Training of employees to use the new system.
- 5** — **FINE TUNING**  
Customization and optimization of the system based on user feedback.

By taking this structured approach, the company was able to ensure that the transition went smoothly and that employees quickly became familiar with the new system.



## Results

The implementation of proCONTRACTS and the CRM system Microsoft Dynamics 365 brought numerous benefits and led to a significant improvement in the company's efficiency and capacity. **Key results include:**

- ➔ **Time efficiency:** The centralized tool significantly reduced the time needed to switch between different applications.
- ➔ **Error reduction:** Consolidating the processes into a system drastically reduced the error rate. Previously, every second form had to be re-filled out at least once, while now a significantly higher degree of accuracy has been achieved.
- ➔ **Capacity increase:** The company was able to gain about 20% more capacity through the more efficient processes. This made it possible to increase the construction output from 4 megawatts per year to 5–6 megawatts.
- ➔ **User acceptance:** The existing users are very satisfied with the new system, which further promotes acceptance and use of the system.
- ➔ **Cost savings:** Automation and centralized management free up capacity and reduce errors, which indirectly leads to cost savings.
- ➔ **Improved onboarding:** The simplified processes enable faster and more effective onboarding of new employees.

proCONTRACTS offers us the opportunity to have the necessary project and contract information at the ready for both our office and on-site project teams, and to process it independently of the location. As a result, we have increased our productivity by approximately 20% and realized a significant return on investment (ROI).

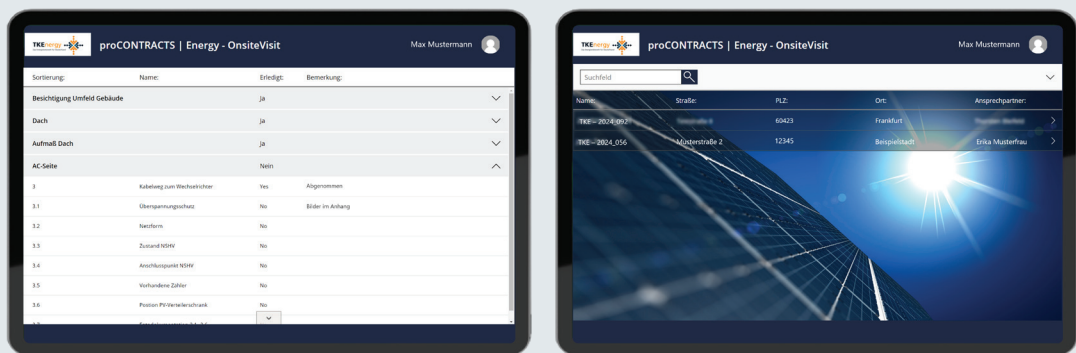
**KAI LAUTERJUNG, TK ENERGY CEO**

These results clearly show that the implementation of proCONTRACTS and Microsoft Dynamics 365 has not only led to an immediate improvement in efficiency, but also has a positive long-term impact on the company, further growth, and business expansion.



## Field service management system

A key objective of the implementation was to optimize field service management. With proCONTRACTS, a powerful contract lifecycle management (CLM) system, a customized canvas app was introduced that enables field staff to capture data and information directly while on the go. The main advantage is that the employees do not work directly in the contract, but on the entity "project". In doing so, proCONTRACTS continues to form the foundation, while the networked processes and entities ensure that the contractually defined degree of fulfilment is automatically determined and checked in the background. This makes it possible to precisely track project progress, identify open tasks and monitor contract completion in real time.



One of the unique features of proCONTRACTS is the seamless integration of contract and project management. TK Energy uses the system to create reliable offers that later serve as the basis for billing for the contractually agreed services. Over 90% of the activities take place on the "project" entity, which makes it clear that proCONTRACTS is not a classic contract management in the conventional sense, but an intelligent platform that seamlessly integrates contracts into the entire business process.





## Future plans and challenges

The successful implementation of the new system is just the first step in the company's ongoing digitization. In the future, the company plans to digitize and fully integrate additional processes into the system. **These include in particular:**

- ➔ Integration of maintenance operations and equipment life cycles into the system
- ➔ Further automation and optimization of existing processes
- ➔ Expansion of the digital infrastructure to support the company's growth

### **Challenges:**

- ➔ **Employee training:** Ensure that all employees receive continuous training and are up to date with the latest technology.
- ➔ **Technological adjustments:** Adapt to technological changes and continuously improve the CRM system.
- ➔ **Industry-specific requirements:** Take into account the specific requirements of the renewable energy industry and adapt the system accordingly.

In an initial phase, proCONTRACTS allowed us to digitize our existing business processes and successfully optimize our project processes. These are essential foundations for our continued growth. In the future, we will also be looking into further functionalities, such as the use of AI with proCONTRACTS AI, and we already see further potential for optimizing our business processes.

**KAI LAUTERJUNG, TK ENERGY CEO**

The ongoing digitization and integration of new processes into the system will help the company to remain competitive and meet the increasing industry demands.



## Summary

This case study is an impressive example of how a small renewable energy company was able to significantly improve efficiency and streamline processes by implementing a centralized contract management solution in combination with a CRM system. The collaboration with **CRMFIRST** proved to be extremely successful, which was made possible by the provider's ability to adapt quickly and its high degree of flexibility. The fully automated contract process covers every step, from the preparation of the offer to the signing of the contract and the final billing of the project. Within just 40 days, a comprehensive end-to-end solution was implemented, including project management, customer master data, contract management, and a mobile canvas app.

The results achieved, such as reducing the error rate, increasing capacity and improving time efficiency, underline the importance of well-thought-out and targeted digitization. For the company, this not only means an immediate improvement in workflows, but also a long-term strengthening of its competitiveness and a sustainable assurance of growth.

Due to the ongoing digitization and integration of further processes into the system, the company is well equipped to meet the challenges in the future and to continue to operate successfully in the renewable energy sector.



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