opentext™

SUCCESS STORY

ENGIE Italia

Industry
• Energy

Solutions
• OpenText™ Documentum™
• OpenText™ Extended ECM for Salesforce
• OpenText™ Intelligent Capture

Partner
• PIC SERVIZI PER L'INFORMATICA

Results

📈 **Enabled tight EIM integration** with Salesforce CRM, avoiding the need for employees to swivel between OpenText™ Extended ECM and Salesforce CRM.

🗄 **Safeguarded** 200,000 key documents and counting, with headroom for ongoing expansion.

📉 **Enhanced the efficiency** of B2B contract negotiations, helping ENGIE Italia boost competitiveness and win new business.

ENGIE Italia boosts competitiveness with a fast, responsive pre-contract process

Energy company streamlines B2B contract negotiations with OpenText™ Extended ECM for Salesforce®

"Thanks to OpenText Extended ECM for Salesforce, we're enabling the business to respond to client requests for contract proposals quickly— helping to sharpen ENGIE Italia's competitive edge."

Francesco Presicce
Manager, IT Business Support
ENGIE Italia
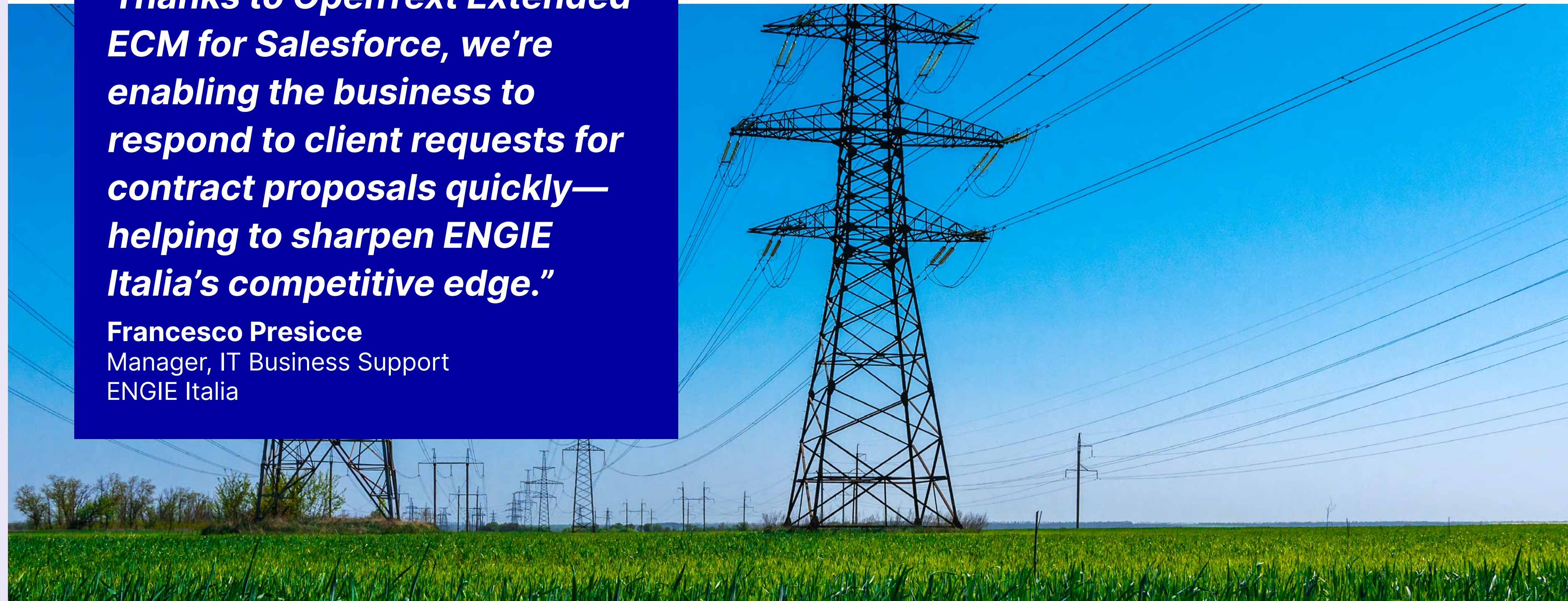
For more than two decades, ENGIE Italia has played a leading role in Italy's energy sector. Headquartered in Milan, the company is pioneering solutions that will help accelerate the country's transition to a carbon-neutral economy, powered by ultra-efficient and environmentally friendly technologies.

ENGIE Italia supports a wide range of customers across Italy, from individuals to public and private enterprises. In the company's B2B division, the public administration department serves such diverse clients as municipal governments, TV networks, and military bases.

Francesco Presicce, Manager, IT Business Support at ENGIE Italia, explains: *"To win B2B clients, an efficient and responsive pre-contract process is vital. This all-important stage in the customer journey generates a significant amount of documentation. To put a winning bid together, our public administration teams need fast access to all the information."*

Manual processes slow contract negotiations

In the past, ENGIE Italia's public administration teams relied heavily on manual methods such as emails, phone calls and spreadsheets to collaborate on bids and prepare new B2B contracts. All key documentation—including building plans, technical schematics, and financial proposals—were stored in shared drives.

"One of the big difficulties with the previous way of working was that there were no standard processes for pre-contract negotiations, which made it difficult to ensure a consistently fast response to client requests for proposals," continues Presicce. *"Using shared drives to store documentation was also slowing our public administration teams down, because the lack of a structured folder system made it time-consuming to find and retrieve information."*

Planning standardized digital workflows

To solve the challenge, the public administration department decided to build a single, standard set of processes for pre-contract negotiations, supported by digital workflows in Salesforce® CRM. At the same time, ENGIE Italia looked for an Enterprise Information Management (EIM) platform that could integrate seamlessly with the Salesforce solution, offering teams faster access to key information.

"When multiple energy businesses are bidding for the same contract, being able to produce a compelling proposal quickly can offer big advantage," adds Presicce. *"We were confident that combining Salesforce CRM with an EIM solution would help our teams respond to potential clients faster."*

"In the coming years, we plan to migrate all our OpenText solutions to AWS, enabling us to unlock the efficiencies of the cloud model, reduce our IT operational costs and increase our responsiveness to the business."

Francesco Presicce
Manager, IT Business Support
ENGIE Italia

Ensuring seamless integration

For more than five years, ENGIE Italia has used OpenText solutions to enable EIM capabilities across its business, including an automated mailroom solution powered by OpenText™ Intelligent Capture and OpenText™ Documentum™. Based on its positive experiences with the OpenText solutions, the company decided to build on its investment in the platform by deploying OpenText™ Extended ECM for Salesforce.

"One of the most important criteria for a new EIM solution for the public administration department was tight integration with Salesforce," states Presicce. *"We wanted to ensure our employees could work in a single system, eliminating the need for time-consuming swiveling between different platforms to retrieve information. With Extended ECM for Salesforce, we can deliver exactly that."*

Partnering with the experts

From the beginning of its journey with OpenText solutions, ENGIE Italia has relied on OpenText business partner PIC Informatica to assist with consulting and technical implementation services. As a result of the strong collaboration between the two companies, ENGIE Italia selected PIC Informatica to help with deploying Extended ECM for Salesforce.

"We greatly appreciate the advice and expertise of the PIC Informatica team," comments Presicce. *"Over many years of working together on different projects, we've built up a very close working relationship. PIC Informatica knows our business back-to-front, which gave us the confidence they would be the perfect partner to help us deploy the new OpenText solution and build the integrations with our other business systems."*

Unlocking process efficiency in the cloud

Working with PIC Informatica, ENGIE Italia deployed Extended ECM for Salesforce in the AWS cloud. Today, the solution is fully integrated with the company's new pre-contract workflow in Salesforce CRM, and with the company's SAP business systems.

Presicce explains: *"Our public administration teams now drive the pre-contract process using Salesforce CRM. At every point, the teams can store and access information via OpenText Extended ECM without ever leaving the Salesforce solution. Once the contract negotiations are complete, we also use the OpenText platform to store the client contracts, which we create in SAP ERP."*

Presicce adds: *"We are pursuing a cloud-first strategy—and deploying Extended ECM on AWS is part of that initiative. In the coming years, we plan to migrate all our OpenText solutions to AWS, enabling us to unlock the efficiencies of the cloud model, reduce our IT operational costs and increase our responsiveness to the business."*

Responding to clients faster

With Extended ECM for Salesforce at the foundation of its new pre-contract workflow for B2B prospects, ENGIE Italia empowers its public administration teams to work more effectively than ever.

"Today, employees use a single system to upload and view pre-contract information," says Presicce. *"When we add a prospective client to Salesforce CRM, the OpenText solution automatically sets up a folder for all correspondence and documentation related to that prospect. At the end of the process, the client contract is stored in the same place, which makes it easy to refer back to all the information when the contract comes up for renewal."*

After one year of using the new solution, ENGIE Italia has stored 200,000 documents in Extended ECM. The company sees that the total volume of documents will continue to grow as it bids for—and wins—new business from B2B clients.

"We've been very happy with the training we received from PIC Informatica," adds Presicce. *"Although there were a few teething problems at first, we quickly overcame them. Today, all 400 people in the public administration division use the solution to drive their daily activities. The feedback has been very positive—our teams especially appreciate how easy it is to search for documents using Extended ECM."*

Planning future process enhancements

Looking ahead, ENGIE Italia is exploring additional ways to harness the OpenText solution to accelerate and streamline its business processes. For example, the company is planning to extend the solution to cover its B2C customer care teams—helping to ensure that all customer documentation is immediately available to representatives within Salesforce CRM.

"Whether we are serving B2B or B2C markets, responsive services are crucial to delight our customers and foster their loyalty," concludes Presicce. *"Thanks to OpenText Extended ECM for Salesforce, we're enabling the business to respond to client requests for contract proposals quickly—helping to sharpen ENGIE Italia's competitive edge."*

About PIC SERVIZI PER L'INFORMATICA

Since 1990, PIC SERVIZI PER L'INFORMATICA has delivered expert IT services and consulting for enterprises across Europe. Headquartered in Milan, Italy, PIC SERVIZI PER L'INFORMATICA has operations in the cities of Turin and Rome as well as London, England.

About OpenText

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on-premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit **opentext.com**.

Customer stories ↗

opentext.com/contact

Twitter │ **LinkedIn**