

Case Study

Heap and Partners Ltd

Delivery Partner

VEC

Background

Founded by William Heap in 1866, Heap & Partners Ltd are a Wirral based manufacturer and supplier of some of the best process and instrumentation valves and ancillary equipment available on the market, providing for over 60 countries worldwide.

With research, design and manufacturing all to high industry standards, the company have a broad catalogue that includes simple extension spindles, mounting kits, switch boxes, air distribution manifolds, check valves, hygienic diaphragm valves and high-pressure, high-temperature trunnion-mounted ball valves. Their valves are deployed into some of the toughest environments within the oil and gas, sub-sea, and nuclear industries.

Challenge

Following a previous collaboration and continuous relationship, Heap and Partners selected the VEC to work with, having previously investigated digitalisation methods that led to their earlier investment of an advanced 3D printer and Augmented Reality tool for conveniently showcasing their heavy valves to customers.

Heap & Partners Ltd Managing Director David Millar wanted to explore additional cutting-edge technologies to improve efficiencies and strengthen their competitive power.

Their teams had identified a direct correlation between their quotation response times and sales success. Therefore, more accurate and efficient response times could increase sales and deliver clear improvements through enhanced customer service.

Quote enquiries are a time-consuming task. From understanding the specific customer needs and identifying the best-placed person or department, to cataloguing items for generating an exact quote. This process can involve several individuals, a system the company believes can be automated without sacrificing quality and reliance.

Heap & Partners wanted to work alongside technology specialists to make bespoke recommendations for future investments, including the use of Artificial intelligence (AI) for enhanced automation surrounding inbound customer enquiry emails, better capturing in-house knowledge and improving productivity levels.

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Solution

The VEC developed a map for planned action to show research for AI-powered inbox management solutions, considering multiple cost-effective options, best practice methods and trialling those selected for recognising the best-matched solution.

The VEC tested multiple AI platforms to assess performance as well as efficiencies against the specific task set. The VEC was surprised at the time performance in addition to the poor 50% accuracy of some platforms when forwarding on specific enquiries.

Taking these figures into consideration, the VEC's Data Scientist underwent the opportunity to develop something bespoke and in-house for Heap & Partners. Using a Microsoft toolkit they developed a more streamlined tool which quickly assesses content of each email, quickly identifying key words for affiliating with the correct member of the sales team, split into sub-section based on product type.

"It has been fantastic to continue our successful collaboration and further enhance our relationship with the VEC. Heap and Partners continuously thrive on being innovative and this project has enabled us to maximise the opportunities emerging technologies presents."

David Millar, Managing Director, Heap and Partners Ltd

Impact

During a knowledge transfer session, the VEC demonstrated how Heap & Partners can effectively use their new Customer Relations Management System tools (CRM) for quickly responding to enquiries and converting these into direct sales for faster turnover, offering greater convenience and the ideal solution for the company, who often experience over 100 enquiries in a single day.

This system enhances company sales and frees up the operational team's time to focus on other tasks that demand greater attention. It ensures that precise quotes are automatically produced and helps the company nurture strong connections with new and returning clients.

Heap & Partners are now working closely with the VEC in developing a grant application available to them through the Horizons project, which will hugely support them in future investments, now they have identified the correct solution for their business.