



# ORBIS AutomotiveONE



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ORBIS SE SHORT FACTS

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HOW TO START / GET IN TOUCH

# OVERVIEW – ORBIS SE



**Founded  
1986**



**Technology Partners  
Microsoft und SAP**



**ORBIS GROUP**

Growth from 25mn EUR Revenue in 2010 to 132mn EUR in 2024



**AWARDS**

Microsoft partner of the year and Member of the INNER CIRCLE



**3,000+**

Completed Projects



**ORBIS Group**

1000+ employees



**530+**

Active Customers



**Microsoft  
Solutions Partner**



**ORBIS SE 2024**

~ 132 m € Turnover  
49 % Equity Ratio



**20 Locations on  
3 Continents**



ORBIS is your partner for digital transformation. We advise, integrate, optimize and automate processes ... based on the solutions and technologies of our partners Microsoft and SAP as well as our own solutions.



# ORBIS MICROSOFT BUSINESS AREA



## LOCATIONS

- » 21 locations on 3 continents
- » Europe, USA & China



## CUSTOMER ENGAGEMENT with MICROSOFT DYNAMICS 365

### DIGITAL TRANSFORMATION

- » for Marketing, Sales & Services
- » CoPilot



## INDUSTRY PRIORITIES

- » Discrete manufacturing
- » Automotive supplier
- » Construction supplier & Wholesale
- » Cross industry (Consumer, Retail, Logistics...)



## EXPERIENCE

25+ Years of CUSTOMER ENGAGEMENT Experience

Change Management



## OUR TEAMS

- » 350+ MS Consultants, Developers & Experts
- » 1500+ Projects
- » Dedicated team with extensive experience in industry processes



## TAILORMADE SERVICES

- » Best practice ISV solutions
- » D365 Industry templates
- » Innovative consulting offers



## BUSINESS VALUE (Value +)

- » Data-based process transformation
- » KPI-based value realization
- » Organizational impact consulting



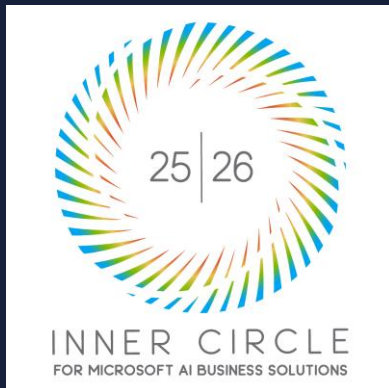
## PARTNERSHIP

- Leading PARTNER in Europe for
- » Microsoft Customer Engagement & Power Platform
  - » Microsoft Catalyst
  - » FastTrack Ready Partner



## AWARDS

- » Member of the INNER CIRCLE 2025/2026
- » 5 FastTrack Recognized Solution Architects
- » MVP Business Applications



## MICROSOFT POWER PLATFORM

- » Professional low-code / pro-code approach for LOB applications
- » Proactive Insights & BI

## MODERN COMMUNICATION & COLLABORATION with M365

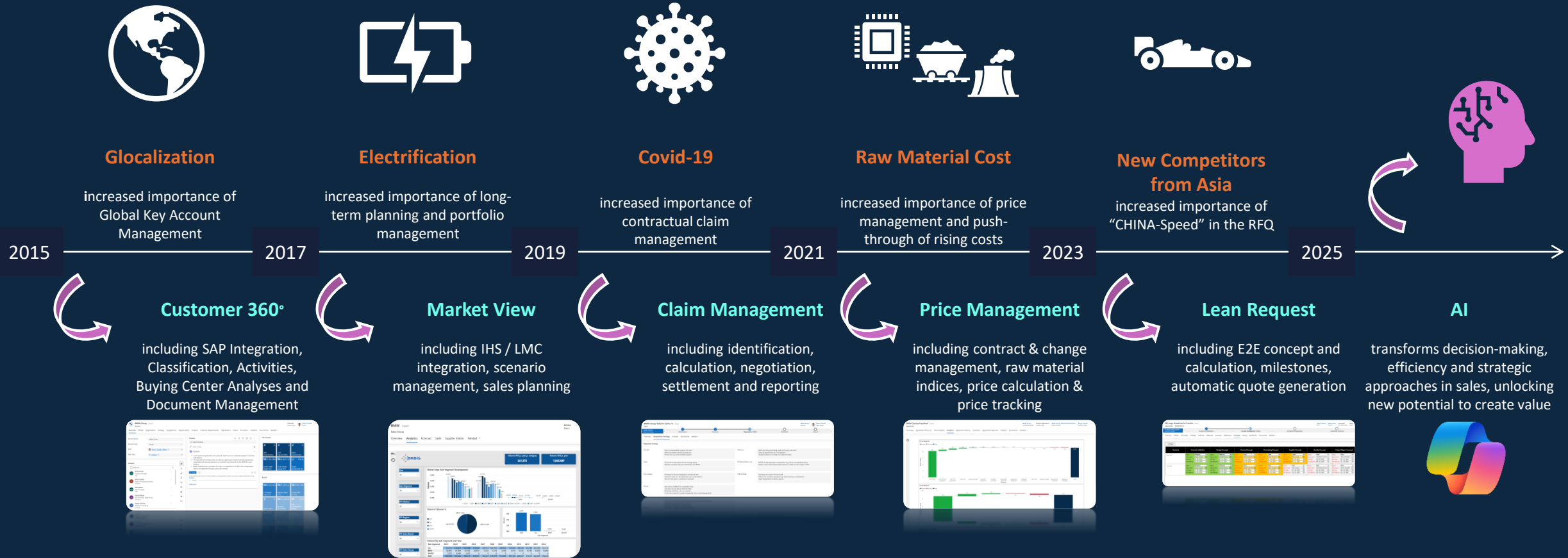
## CLOUD DEVELOPMENT BASED ON AZURE

- » Cloud Native
- » IaaS / PaaS / SaaS
- » Azure AI & Agentic

# Evolution of an Automotive Supplier CRM



## A system defined by the industry for the industry



# Automotive, Defense and Aerospace Clients Trust Us

You cannot buy trust – you earn it





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# TASK FORCE MODE IS THE NEW NORMAL



Geopolitical Conflicts



Trade Wars



Supply Chain Disruptions



Inflation



OEM Crisis



Regulatory Uncertainty



# A CHANGE NEVER SEEN BEFORE



Electrification



Connectivity



Autonomous Driving



Glocalization



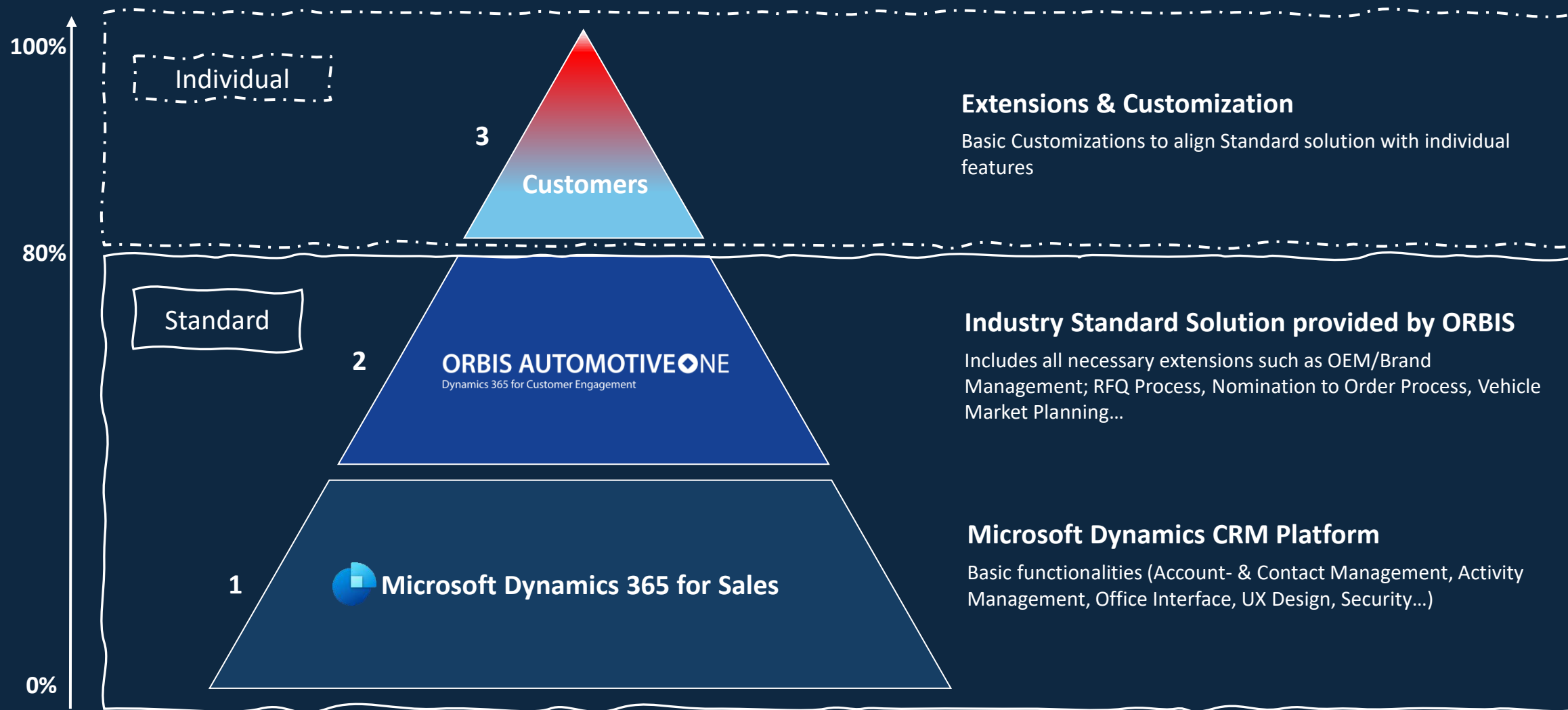
Demographic Change



Sustainability



# AutomotiveOne approach



# Process Portfolio

<p>Marketing</p> 	<p>Key Account Management</p> 	<p>Contract Management</p> 	<p>Market Intelligence</p> 	<p>Portfolio Management</p> 	
<p>Opportunity Management &amp; Lifecycle Management</p> 					
<p>Milestones</p> 	<p>Planning</p> 	<p>Scenario Management</p> 	<p>Workorder Management</p> 	<p>Quotation Management</p> 	<p>Agreement Management</p> 
<p>Change Management</p> 	<p>Reimbursements</p> 	<p>Reference Monitoring</p> 	<p>Pricelists</p> 	<p>Order Management</p> 	<p>Claim Management</p> 
<p>Collaboration</p> 	<p>Analytics</p> 	<p>Integration</p> 	<p>AI</p> 	<p>Security &amp; Permission</p> 	

# AutomotiveONE TECHNOLOGY PORTFOLIO



# Key Account Management



Master data, non-booked business, booked business at one place



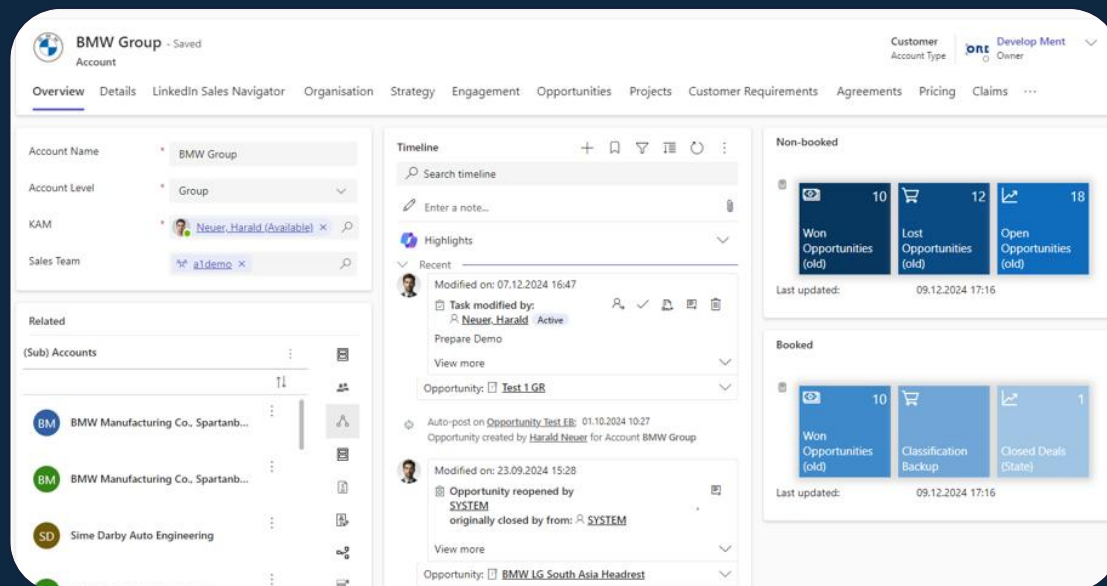
Outlook and LinkedIn integration for communication



Streamlining of strategy with classification, buying center and customer engagement



Teams and SharePoint integration for collaboration



Copilot supporting Sales in customer interaction



Parametrized integration of market forecasts



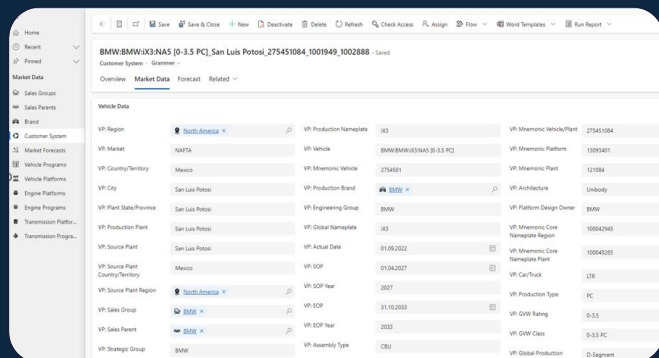
Best practice reporting and analysis



Business proven SAP integration with predefined template processes

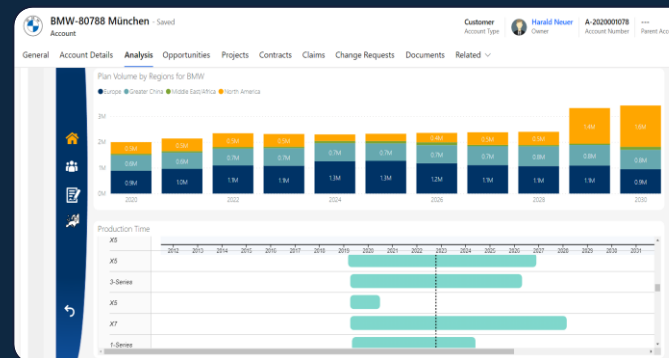
# Sales Planning

## Integration



- ✓ Integration of market data via excel upload, integration of internal data base or external interface
- ✓ Flexible combination of LV (vehicle, engine & transmission) and CV data bases

## Visualization



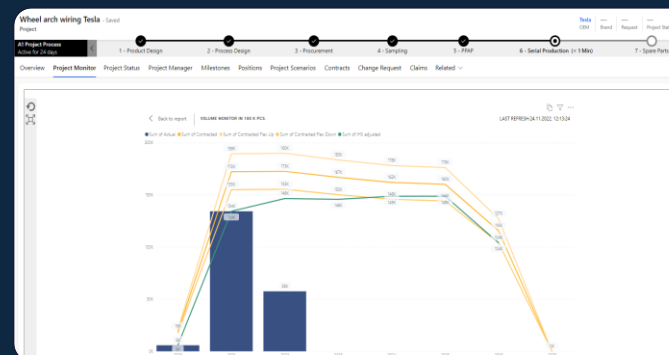
- ✓ Visualization of market forecasts via modern analytic tools
- ✓ Define automatic notifications for new vehicles or volume drop-offs

## Planning

Position	Year	Vehicle Volume	Parts per Vehicle	Take Rate	Installation Rate	Part Volumes	Base Price	Turnover
POS-123	2023	302,452	2	50%	44%	44,567	32,32 €	1,443,393,18 €
POS-123	2024	345,632	2	50%	44%	63,300	32,32 €	2,047,469,41 €
POS-123	2025	388,812	2	50%	44%	82,133	32,32 €	2,654,545,67 €
POS-123	2026	375,943	2	50%	44%	76,492	32,32 €	2,472,211,91 €
POS-123	2027	352,874	2	50%	44%	70,850	32,32 €	2,288,878,14 €
POS-123	2028	349,905	2	50%	44%	65,209	32,32 €	2,107,544,38 €

- ✓ Integrate market volumes in your opportunity and projects scenarios
- ✓ Automatically update opportunity and project forecast when updating market data

## Analysis

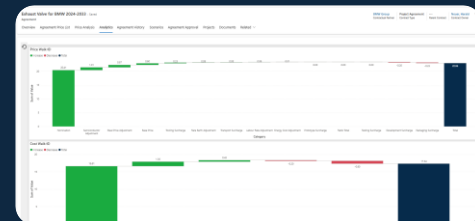
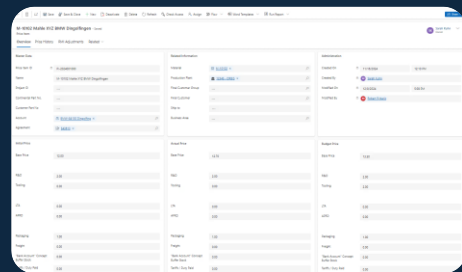


- ✓ Analyze market volumes per customer, project, technology
- ✓ White spot analysis and identification of chances and risks
- ✓ Identify claim potentials before they occur

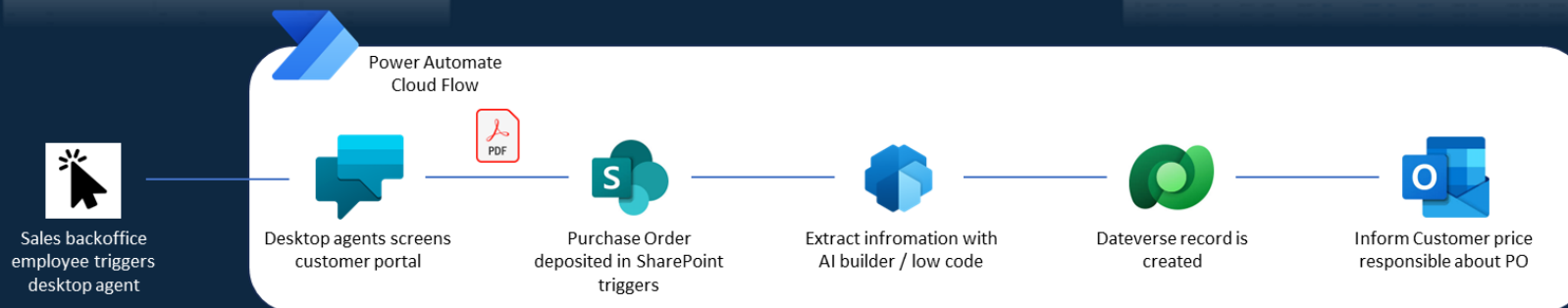


# Price Management

Sales Price Calculation including price element breakdown and Reference Databases



AI driven price updates from OEM portal including analysis of POs



Distinct integration between CRM & SAP to close gap between Sales & Plants



Price Item	Agreement Price	Purchase Order Price	SAP Price	Delta
0001	1.00	1.00	1.00	0.00
0002	1.00	1.00	1.00	0.00
0003	1.00	1.00	1.00	0.00
0004	1.00	1.00	1.00	0.00
0005	1.00	1.00	1.00	0.00
0006	1.00	1.00	1.00	0.00
0007	1.00	1.00	1.00	0.00
0008	1.00	1.00	1.00	0.00
0009	1.00	1.00	1.00	0.00
0010	1.00	1.00	1.00	0.00

# Opportunity Management

This screenshot shows the CRM interface for an opportunity named 'NK Large Headrests 1st Tranche'. The interface includes a top navigation bar with tabs for 'Overview', 'Details', 'One Pager', 'Strategy', 'Activities', 'Products', 'Scenarios', 'Milestones', 'Concepts', 'Quotations', and 'Documents'. The main content area is divided into several sections: a left sidebar with metadata (Opportunity No., Account, Group Account, Technology, Corporate Region, Likelihood, SOP, EOP, Buying Center), a central 'Timeline' section with a search bar and recent activity log, and a right sidebar with 'KPIs' (Lifetime Turnover, Lifetime Volume, Average Price) and a 'PowerBI' chart.

Business process flow including milestones and review gates

Basic and enhanced Teams integration

This screenshot shows the CRM interface for an opportunity named 'BMW 1er Green Caliper EV 2022'. It features a top navigation bar with tabs for 'Overview', 'Details', 'Classification', 'Manager', 'Positions', 'Scenario', 'Workorders', 'Analysis', 'Pricing', 'Quotations', and 'Related'. The main content area includes a 'Completed' checklist with items like 'Opportunity Details defined', 'Opportunity Assessment conducted', 'Initial Scenario defined', 'Go / no go requested', and 'Go / no go received'. A 'Set Active' button is visible at the bottom of the checklist.

Standardized opportunity evaluation and classification

Task management including Kanban board and Gantt chart


PowerBI integration for monitoring and reporting directly in CRM

# AI



# Copilot

Your everyday AI companion

Selected automotive use cases by 

**OEM portal screening** and document routing by desktop agent

PDF recognition and **automatic sales order creation** in SAP/CRM

**Routing of service requests** to the right counterpart

**Screening of market news** and targeted posting into user timelines

Analysis of calculation docs and transfer of **excel into database**

**Raw material price crawler** updating CRM database based on LME

**Contract version comparison** to identify changes in T&Cs

Alexa-like **voice controlled search** engine for internal databases

**Intranet chatbot** for employees' questions to relieve internal support

**Technical knowledge base** chatbot respecting access right



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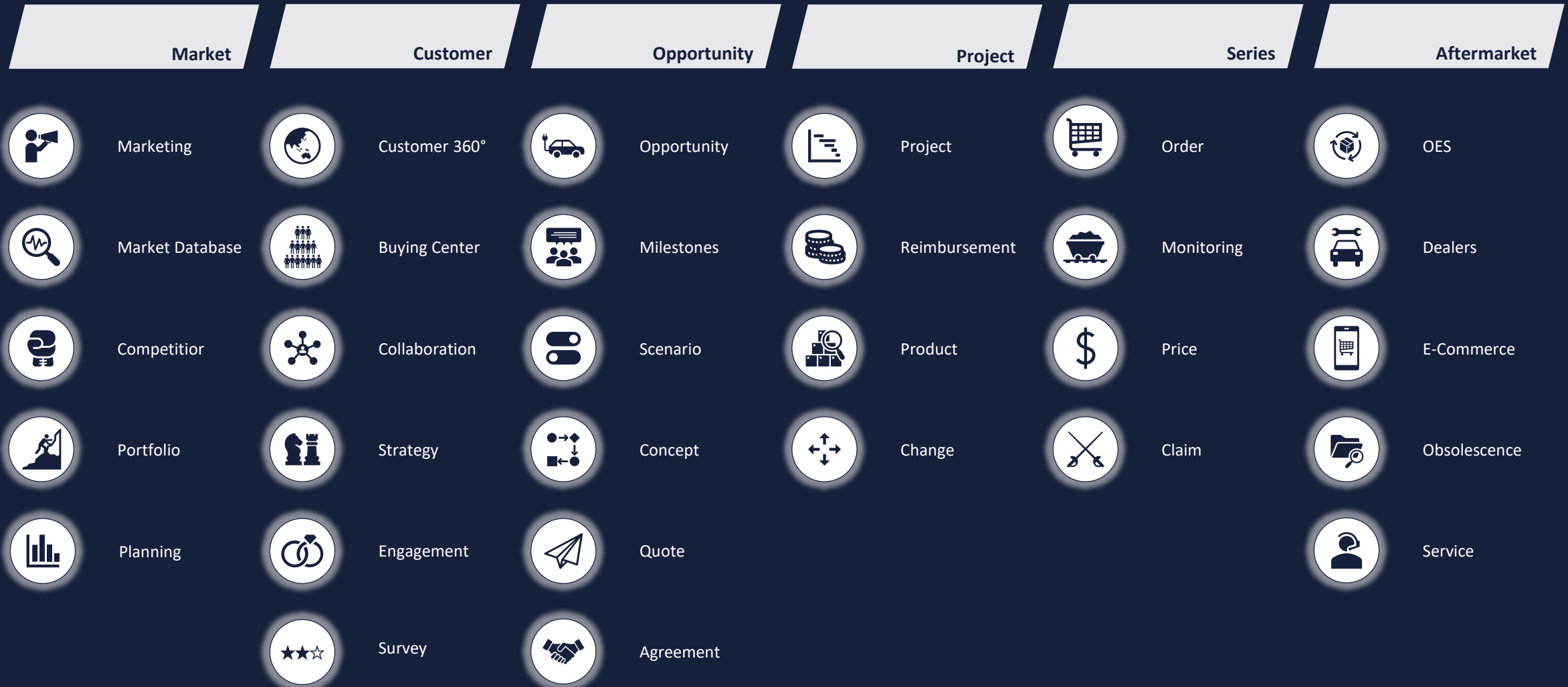
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HOW TO START / GET IN TOUCH

# PROCESS PORTFOLIO & USE CASES



# CHALLENGES & SOLUTIONS MARKET



**Fragmented and isolated production forecast shared via EXCEL file with operative sales**



**Central up-to-date market forecast in modern analytic tool accessible in CRM**

**Disconnect between market data and business data & no incorporation of market data into planning**



**Integration of market forecasts with business data**

**Inconsistent program strategies across regions, business units and technologies and no identification of white spots and synergies**



**White spots analysis and standardized classification of OEMs, markets, platforms**

**Double counting of tier 2 opportunities**

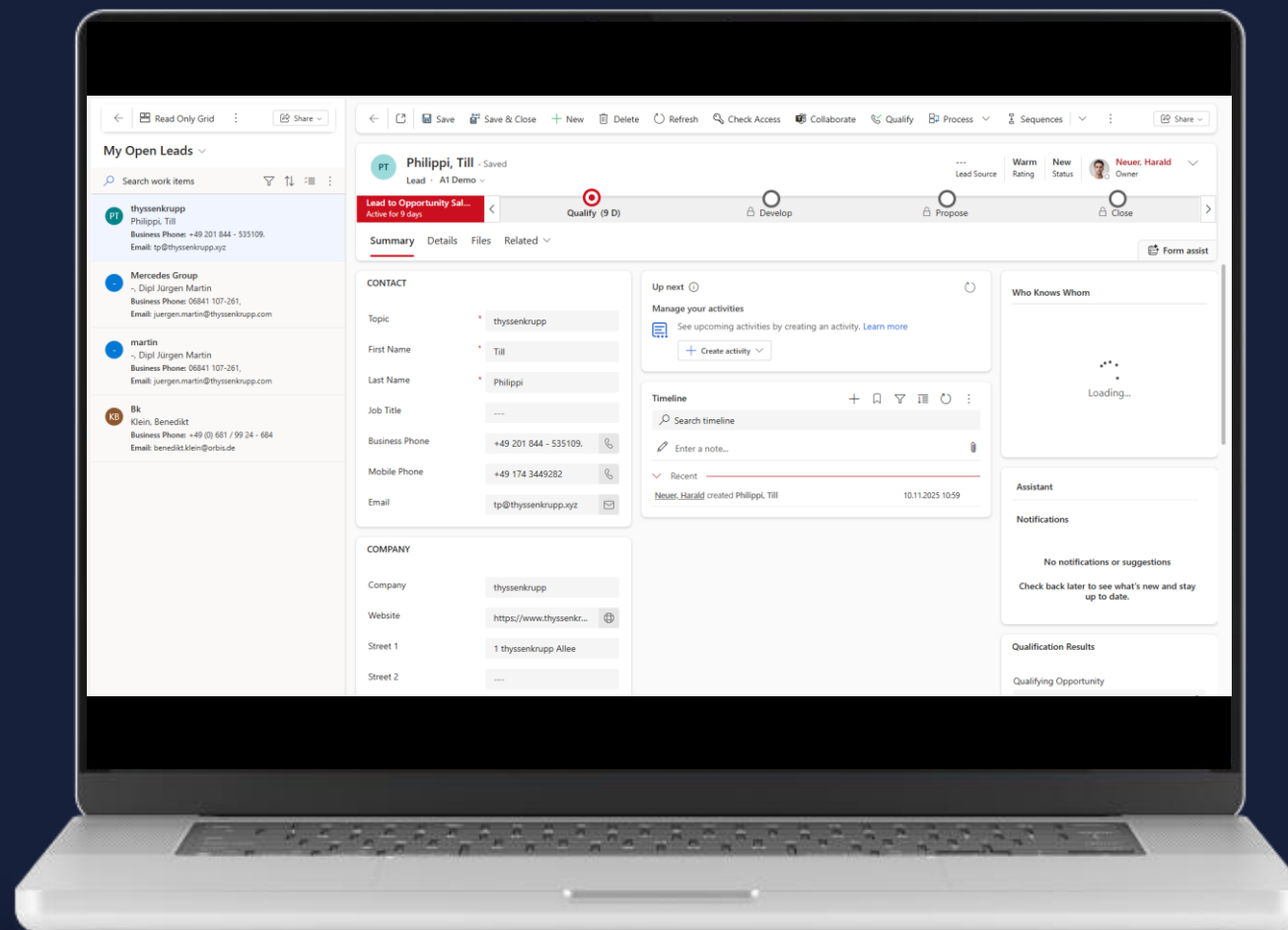


**Intelligent detection of duplicates based on customizable parameters**



## Marketing

- Leads: Efficient capture, qualification, and routing from all channels
- Campaigns: Targeted outreach by program/component with measurable responses
- Events: Smooth event lead capture and automated follow-up from industry shows.





# Market Database

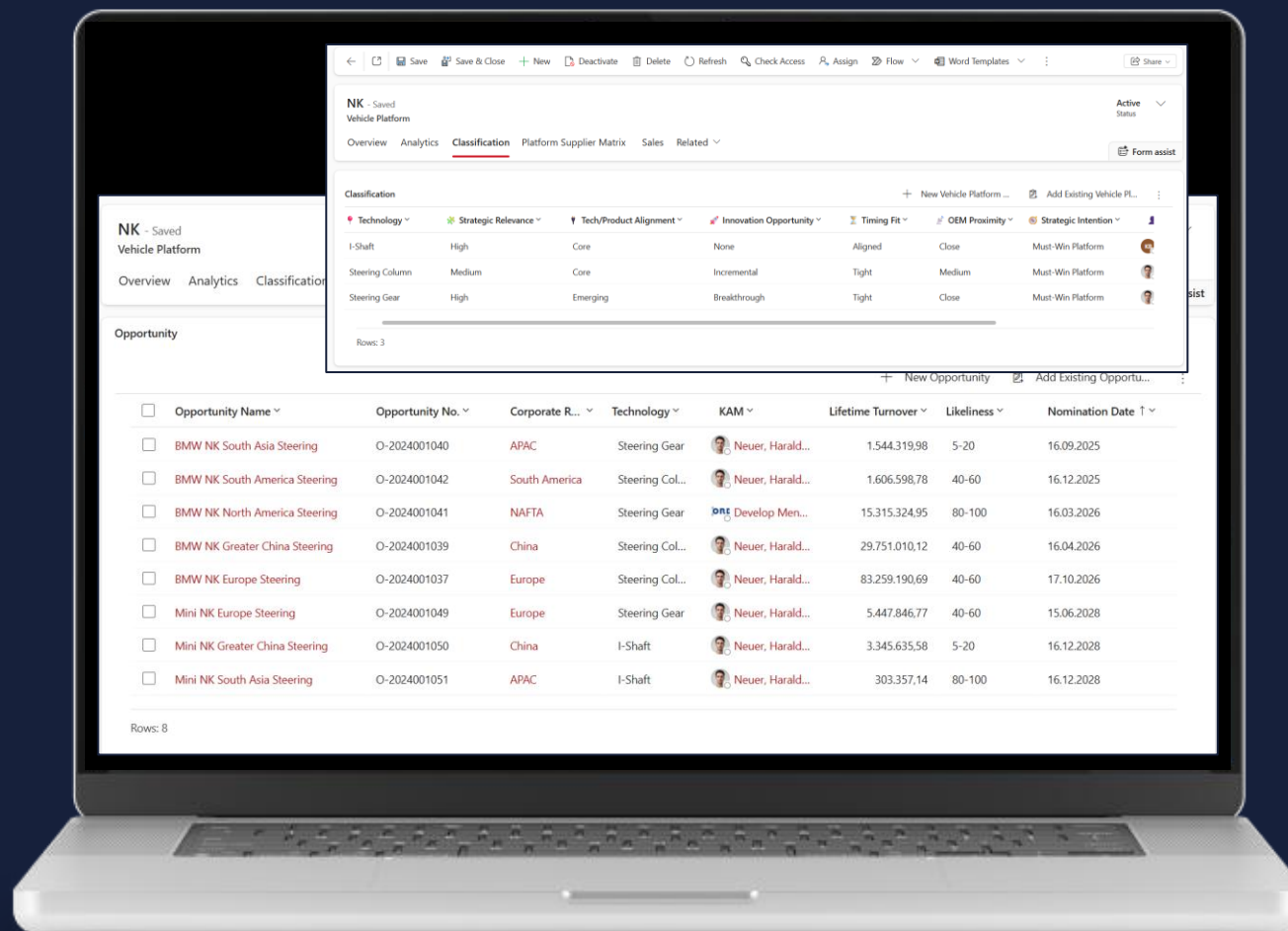
- Full integration of market data – not only forecasts – incl. intelligent search
- Customizable market data model
- Extension of forecast database with news by user or web crawler





# Portfolio

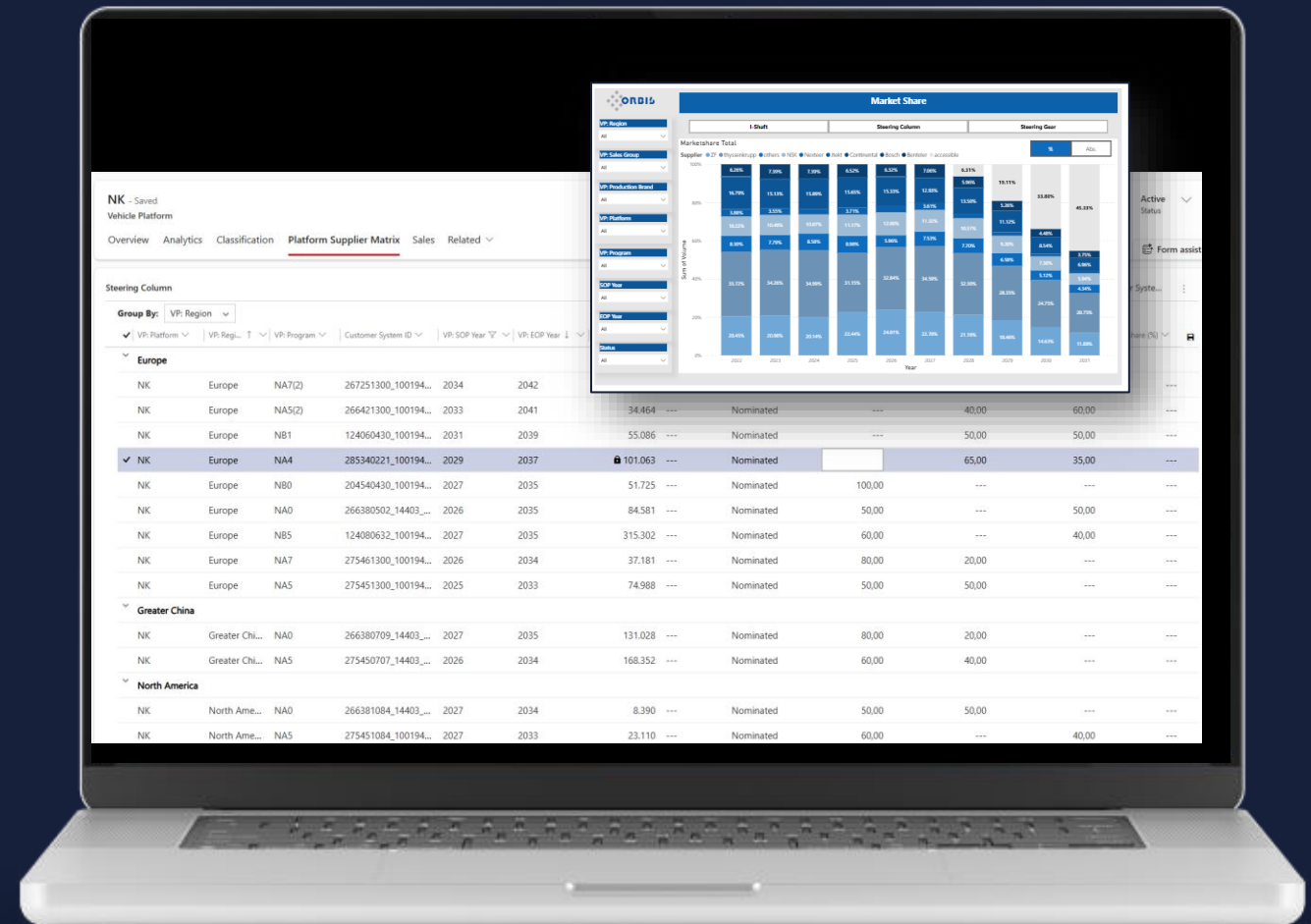
- Technology specific classification of platforms upfront to RFQ
- Targeted approach of OEMs across business units
- Benefit from your internal account network





# Planning

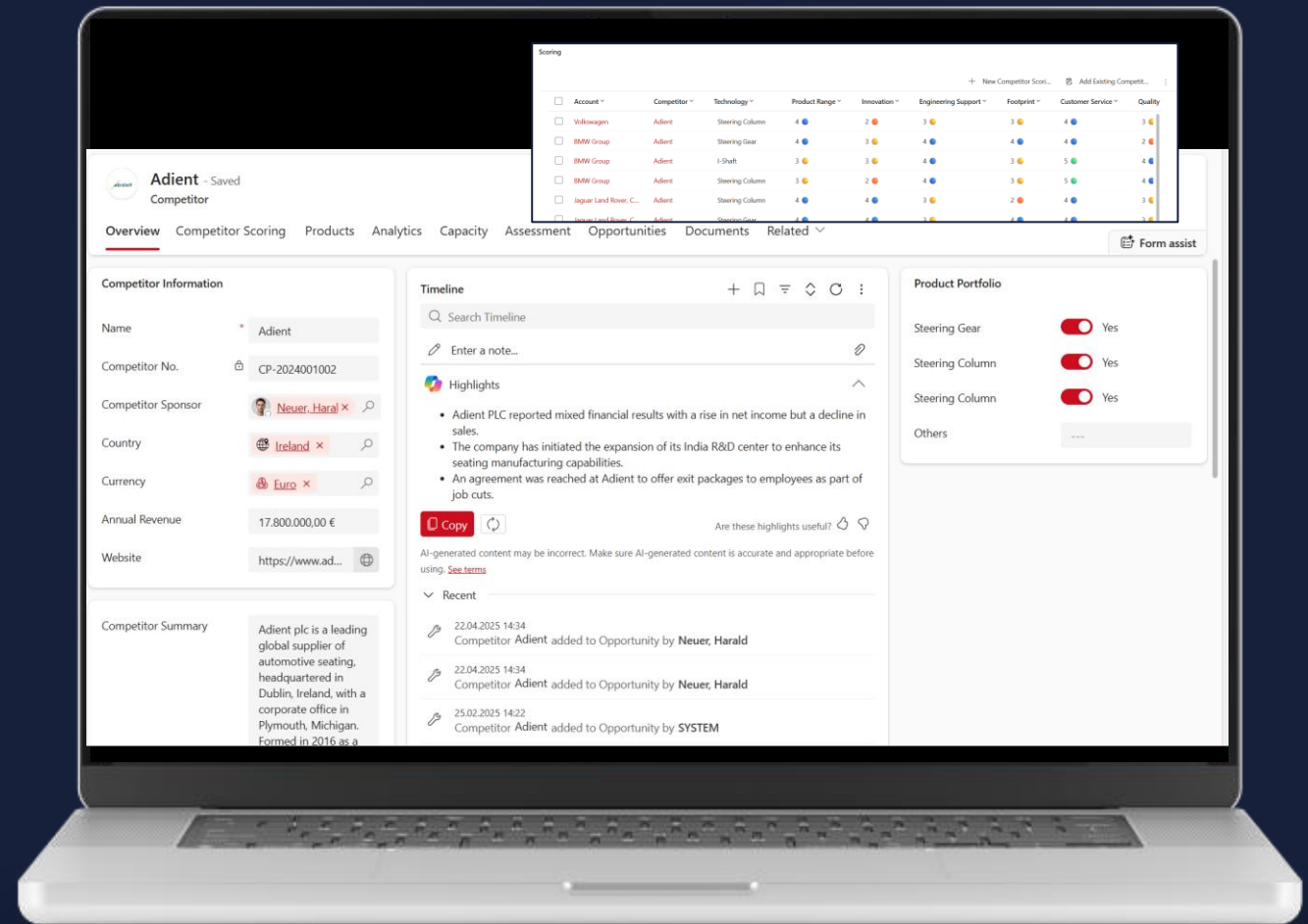
- Ability to build market models with dynamic market forecasts
- Covering multiple dimensions – OEM, technology, region, supplier
- Baseline for any white spot analysis





# Competitor

- Combined analysis of competitor-supplier-technology status
- Derive competitor strategy by capacity constraints
- WLO analysis
- Extensibility with technical benchmark information



# CHALLENGES & SOLUTIONS

## CUSTOMER



Customer information siloed in systems



Single point of truth in CRM

Disconnected sales teams through regions and business units lead to inconsistent customer approach



One communication, collaboration, documentation hub

Informational disadvantage towards the OEM in negotiations and claims



Entire customer history available in CRM

Missing customer engagement outside sales

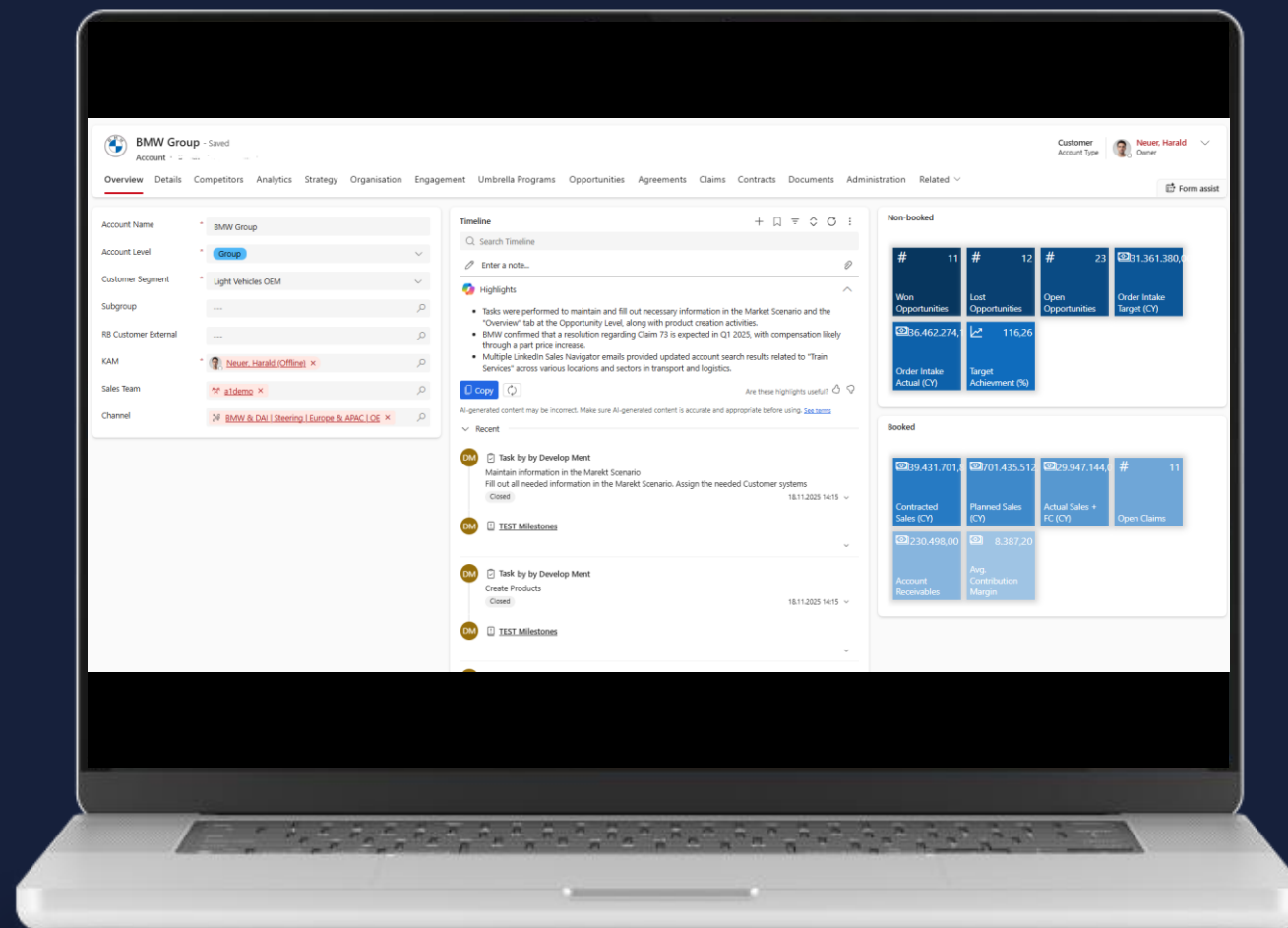


Integration of the entire customer facing organization in CRM



# Customer 360°

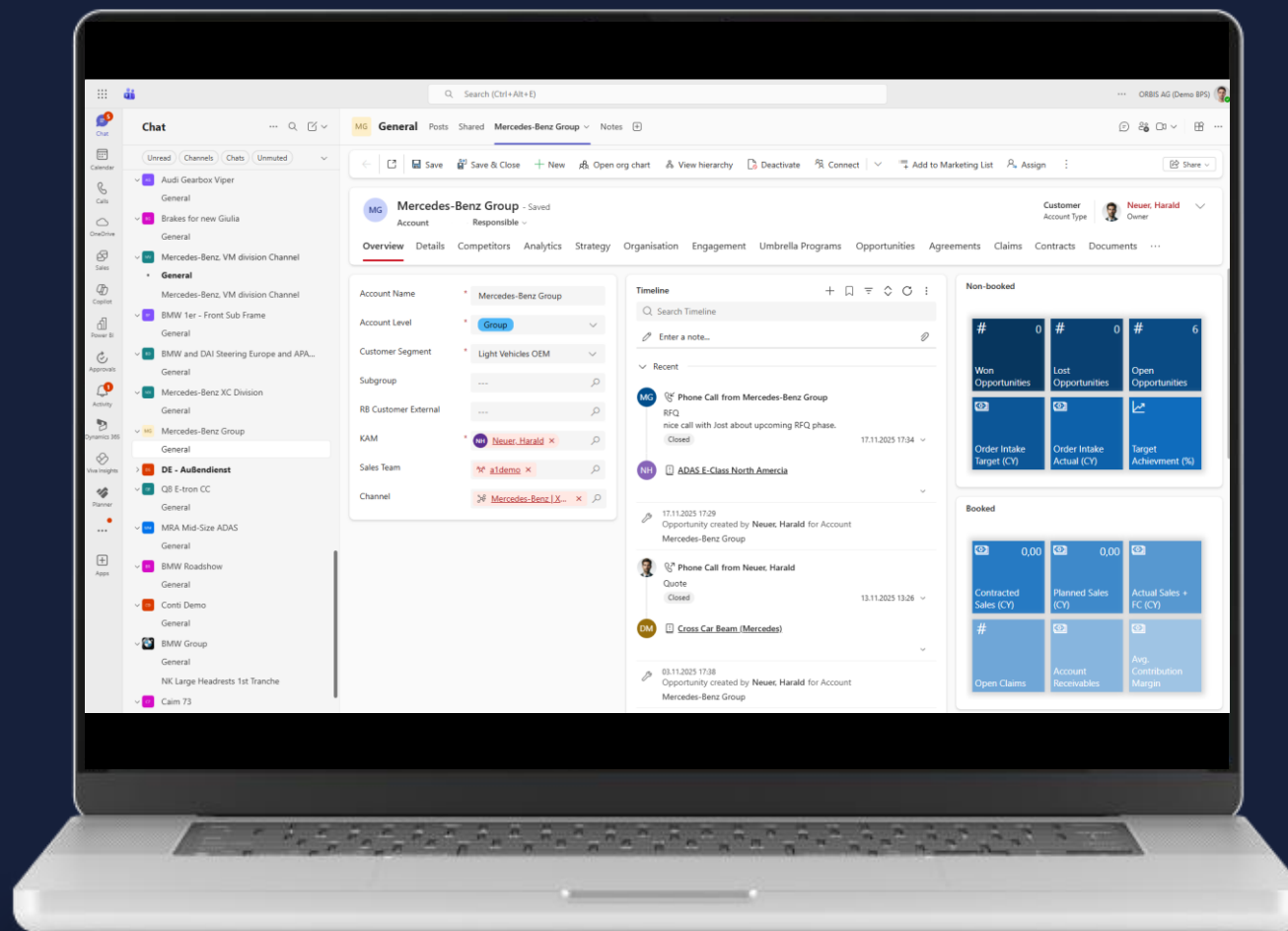
- 360° customer view
- Master data
- Organization
- Communication
- Analytics
- Strategy
- Engagement
- Business objects
- Documentation





# Collaboration

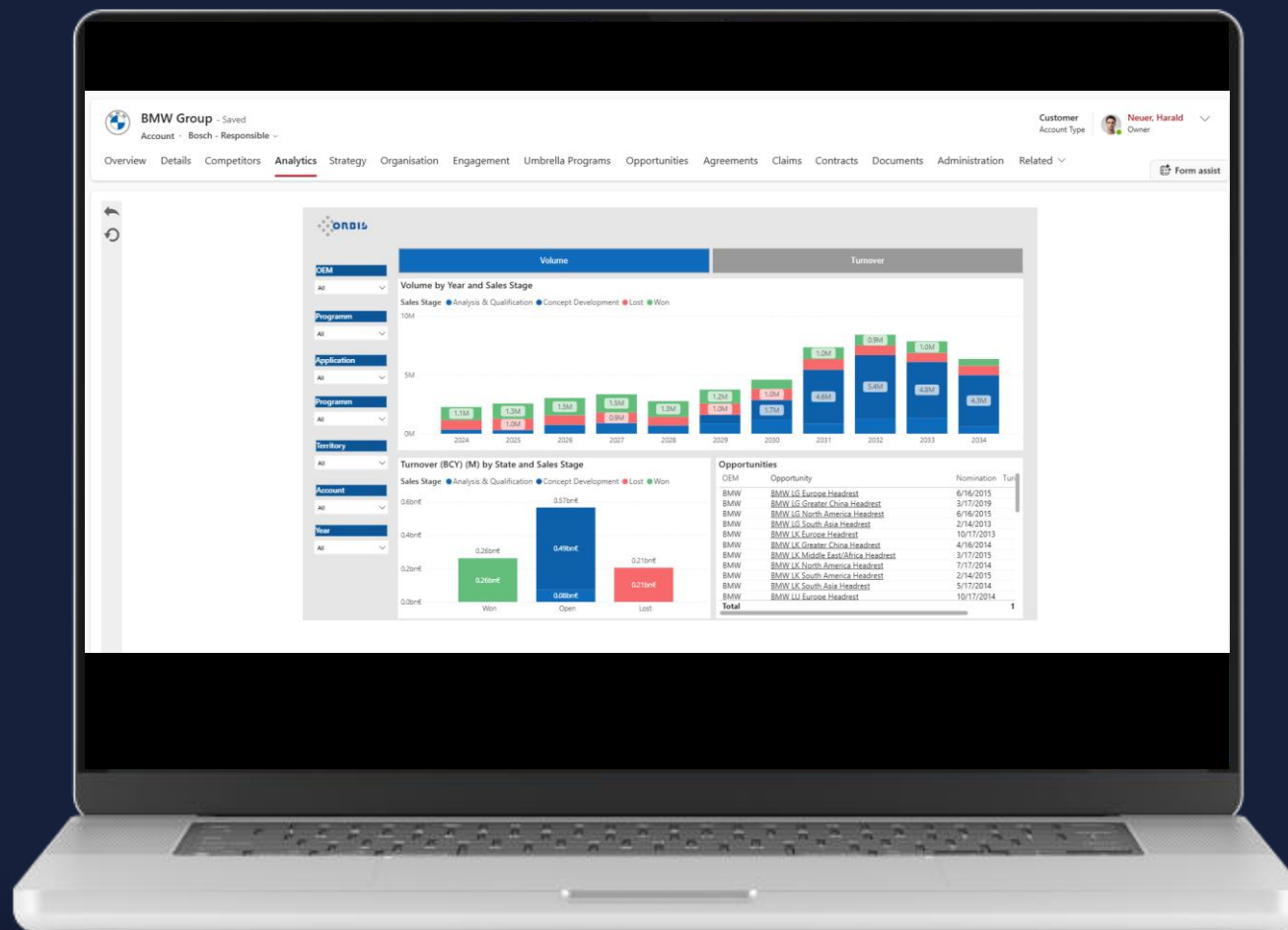
- Streamlined communication and collaboration with external *and* internal stakeholders
- Key enablement for best-in-class Customer Engagement
- Covering all relevant communication channels
  - Emails
  - Appointments
  - Tasks
  - Chat
  - Teams
  - Teams telephony
  - SharePoint
- Analysis of activities and touchpoints via Copilot





# Strategy

- Analytics based on CRM data, ERP data and external data
- Standardized methodology for strategy definition
- Strategy execution via action streams and business objects





## Buying Center Analysis

- Role mapping: Identifies and visualizes decision-makers and influencers within each OEM or tiered buying center
- Engagement insights: Tracks interactions by role to show who is active, blocked, or needs targeted follow-up
- Influence scoring: Rates stakeholder impact to prioritize outreach

BMW Powertrain - Saved

Buying Center - Bosch

Overview **Members & Action Plan** Related

Form assist

Buying Center Members

Contact	Role	Coverage	Influence	Opinion	Motivation	Account	Responsible User
<input type="checkbox"/> Ahjupera, Einhardt	(B) Buyer	(M) Multiple Contact	(1) Weak	(D) Neutral	Commercial		
<input type="checkbox"/> Anna Fischer	(B) Buyer	(B) Brief Contact	(1) Weak	(C) Competitive	Strategy	BMW Group	
<input type="checkbox"/> Dinkelhuber, Heinz	(I) Influencer	(B) Brief Contact	(2) Strong	(C) Competitive	Strategy	BMW Group	
<input type="checkbox"/> Emma Schulz	(E) Evaluator	(M) Multiple Contact	(B) Very Strong	(D) Neutral	Commercial	BMW Group	
<input type="checkbox"/> Felix Weber	(D) Decider	(N) No Contact	(2) Strong	(S) Supportive	Commercial	BMW Group	

Row: 6

Chances

Risks

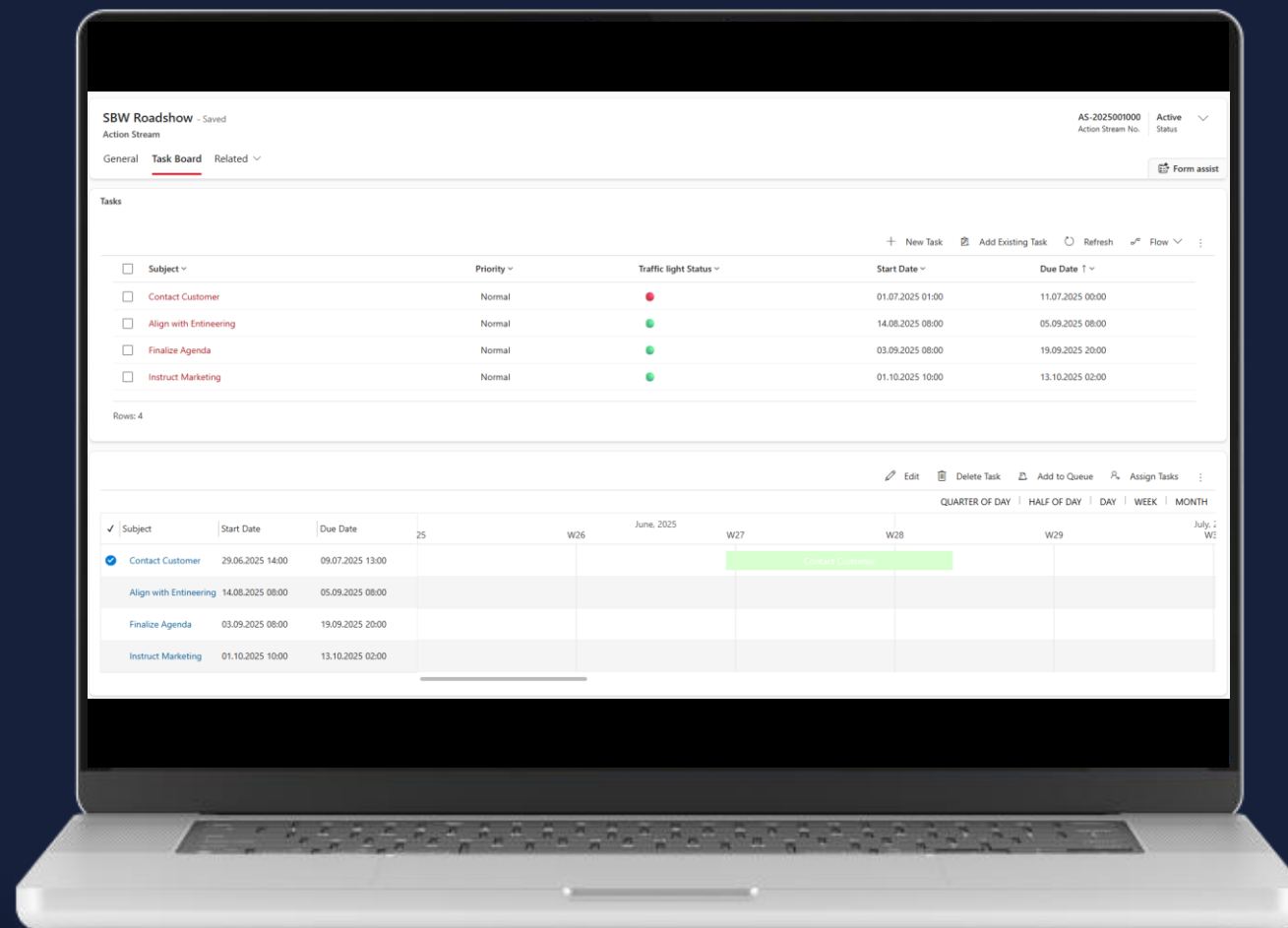
Measures

Subject	Status Reason	Regarding	Contact Rep...	Priority	Due Date	Description	Modified On	Owner
<input type="checkbox"/> Get contact to QAM departments	Not Started	BMW Powertr...		Normal	21.08.2025 08:...		14.08.2025 19:...	Neuer, Harald (Offline)



# Engagement

- Buying center specific customer engagement (across functions)
- Matched pairs for distinct counterparts and responsibilities
- Ability to integrate with surveys / NPS incl. derived action items



# CHALLENGES & SOLUTIONS

## OPPORTUNITY



Opportunity management via EXCEL, PowerPoint and email leads to missing process compliancy



Business process flows and milestones ensure process

Missing prioritization of opportunities – each RFQ is managed with full effort



Systematic opportunity classification closes gap between strategy and sales

Multiple stakeholders working in disconnected tools



Tailored views within one database

Fragmentation of planning, reporting, processing, calculation and quoting

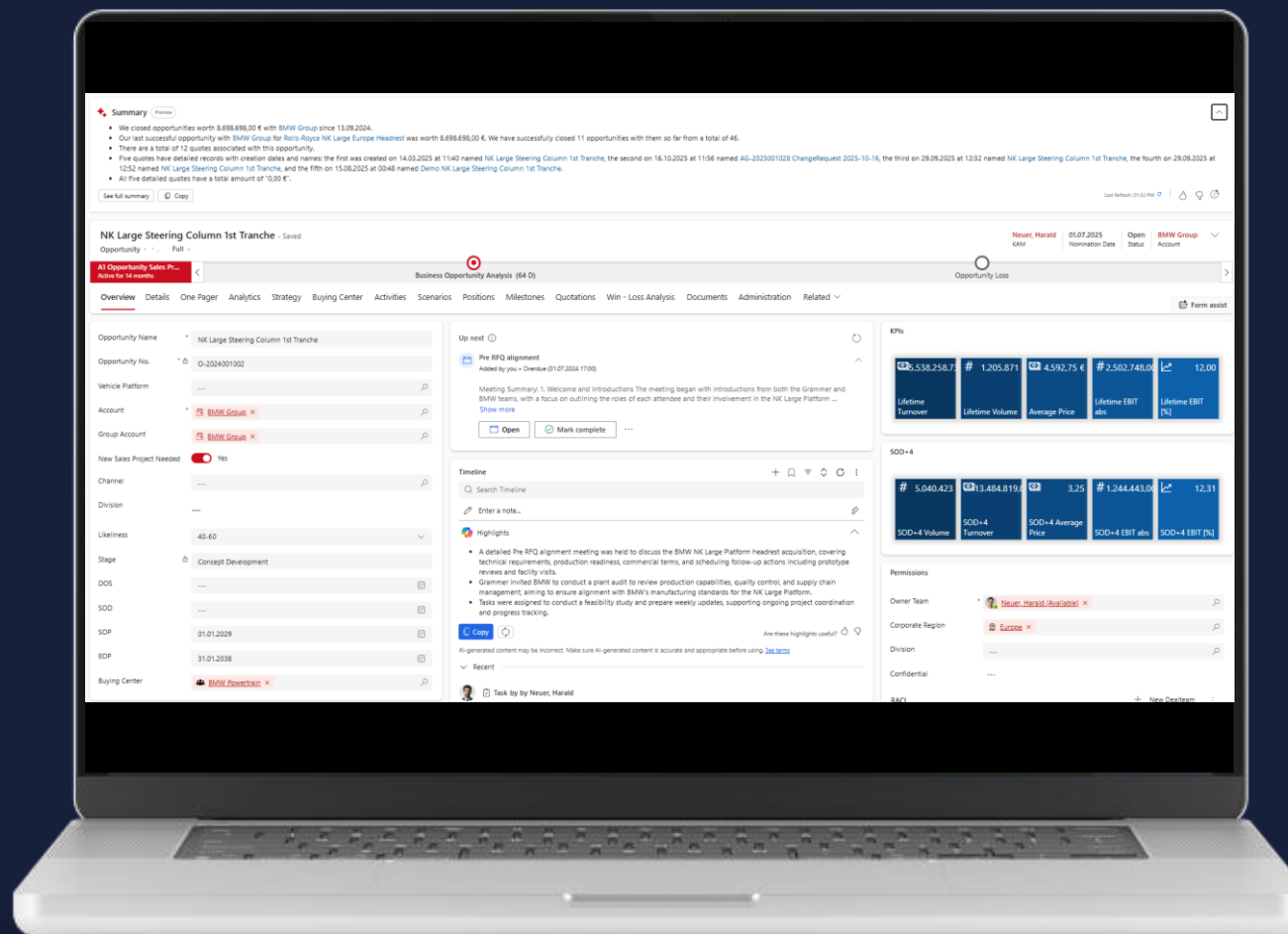


End-to-End opportunity management from identification until project management handover



# Opportunity

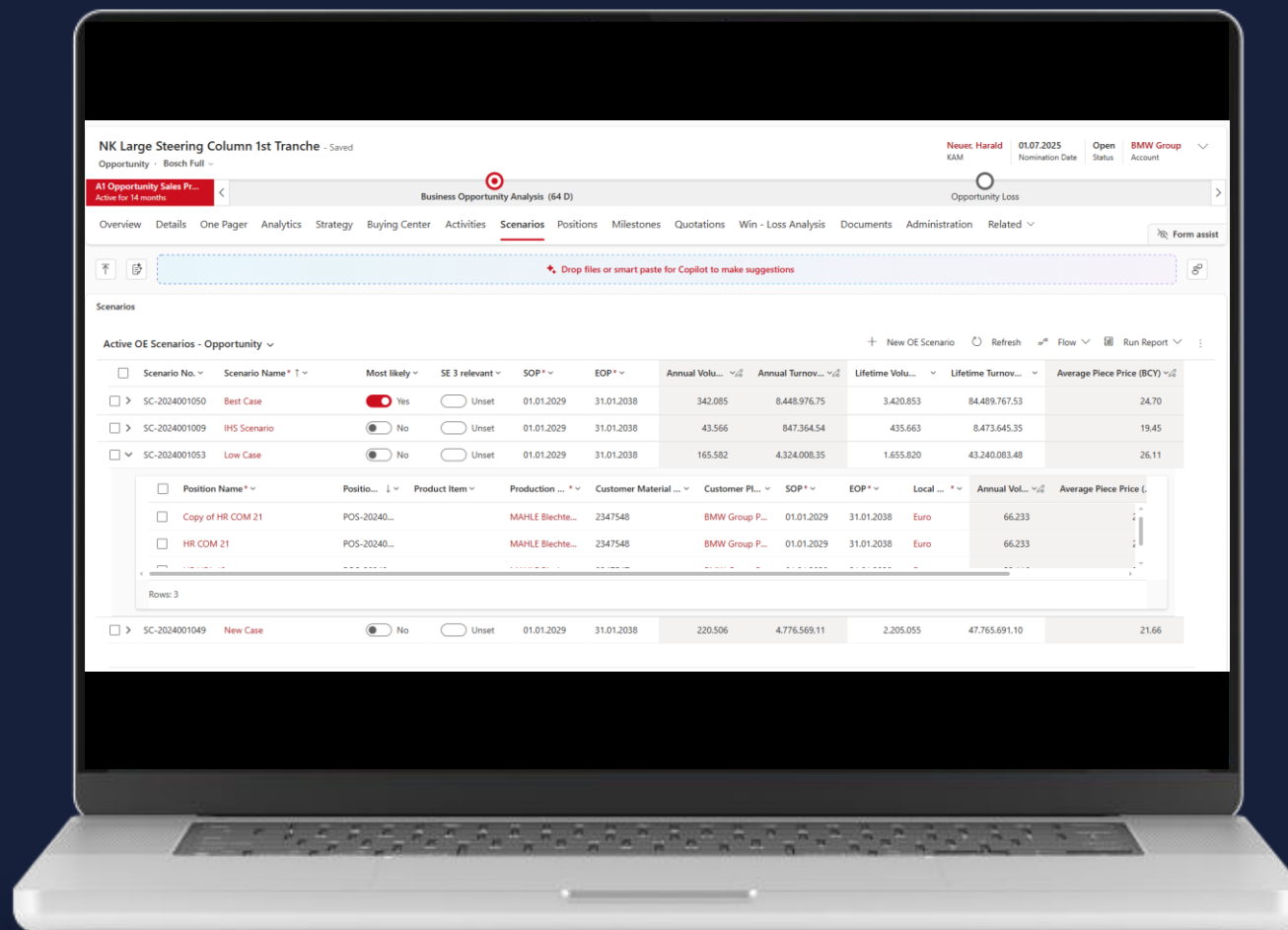
- Best practice supplier data model
- Flexible allocation of information per table
- Minimized maintenance effort by multiple automations, inheritance and copy functions





# Scenario

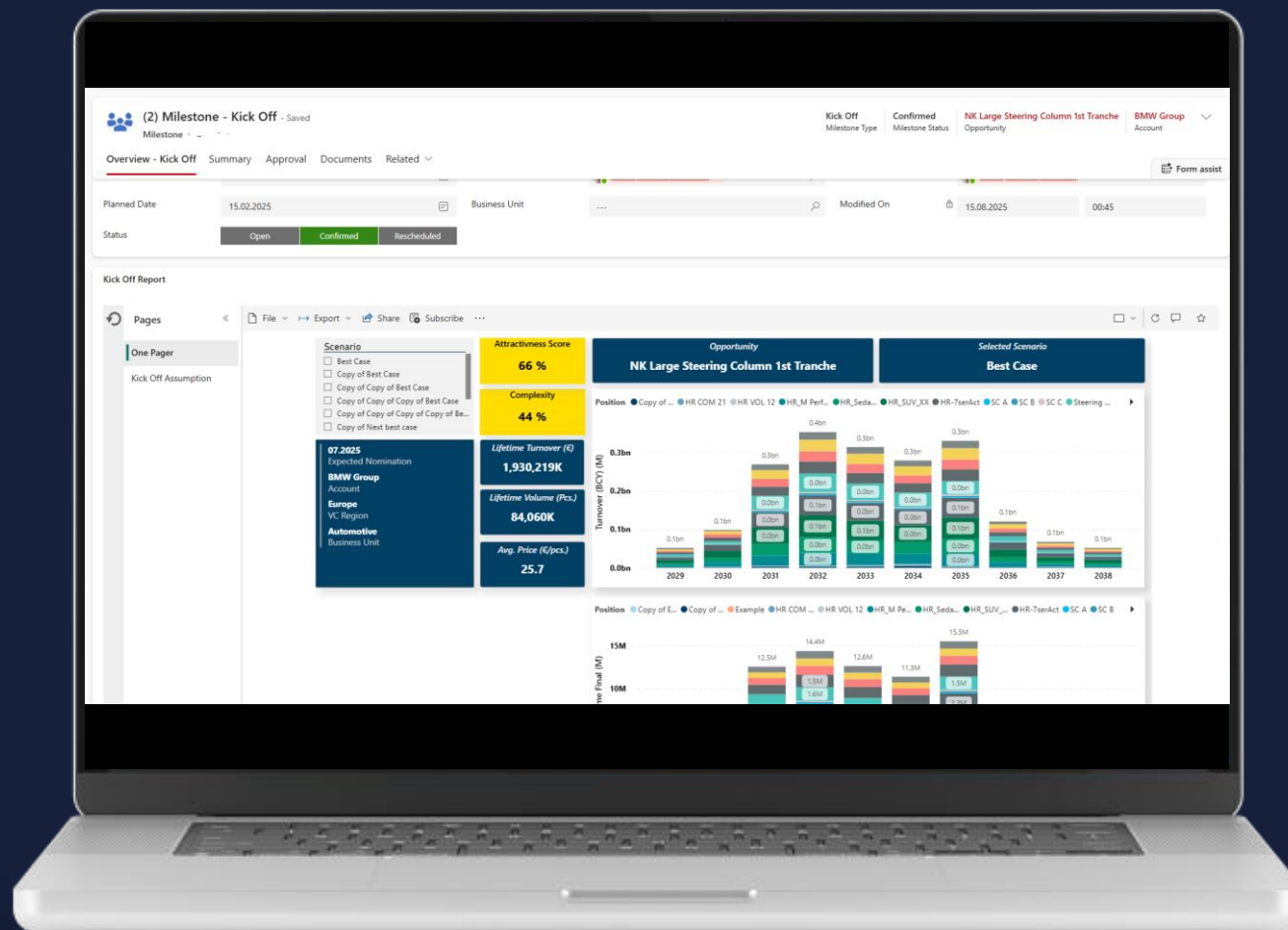
- Challenge customer volumes with market volumes incl. updates from forecast
- Copy scenario and copy position actions to accelerate process





# Milestone

- Custom milestone templates including audit compliant approval and documentation
- Automatic reports via PBI export to PDF and send out via PDF attached to approval





# Concept

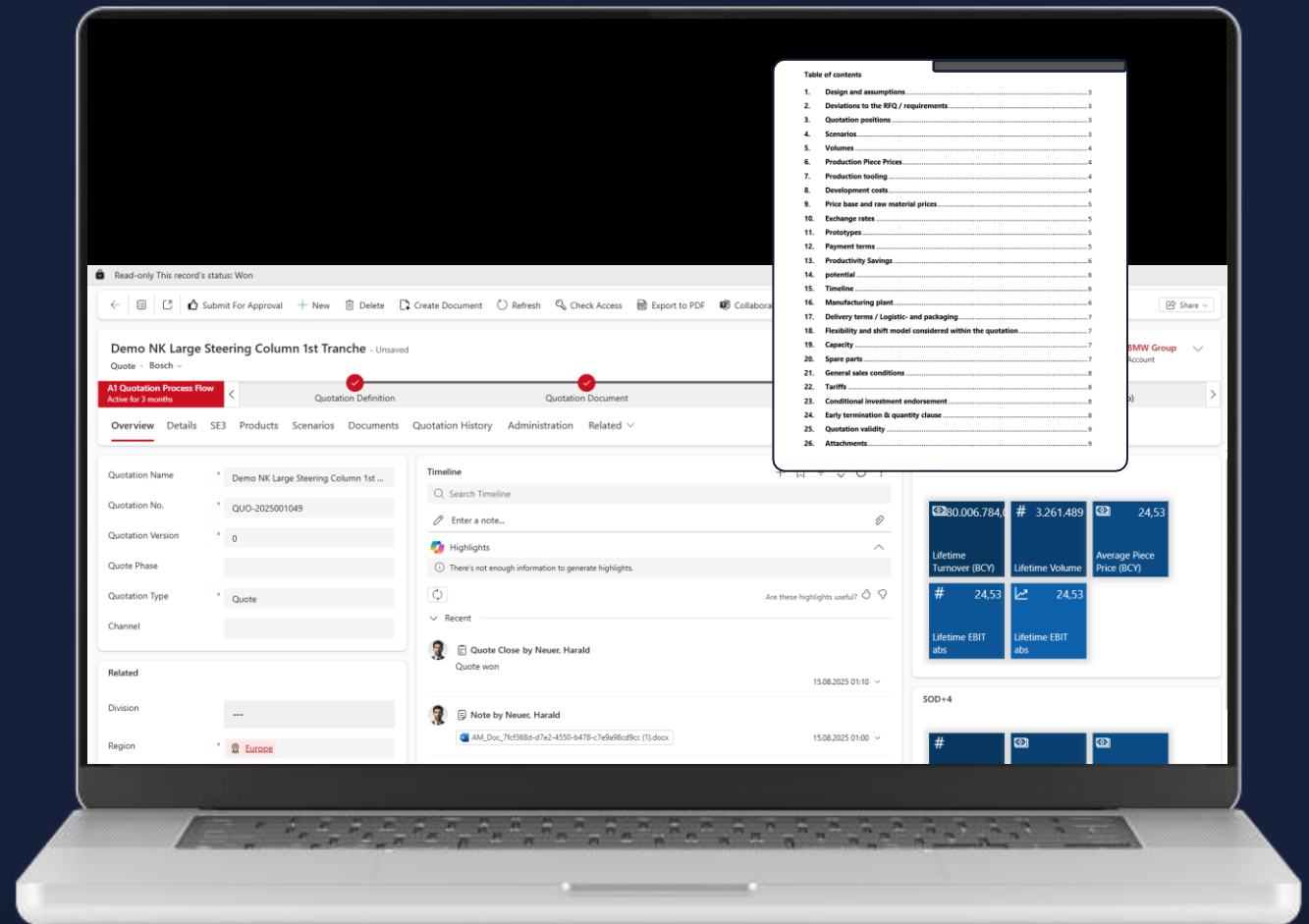
- Autocreation of workorder incl. predecessor / successor and prefill of responsible & timeline
- Configurable parent – scenario/position/mix
- Distinct document folders for inputs and outputs





# Quotation

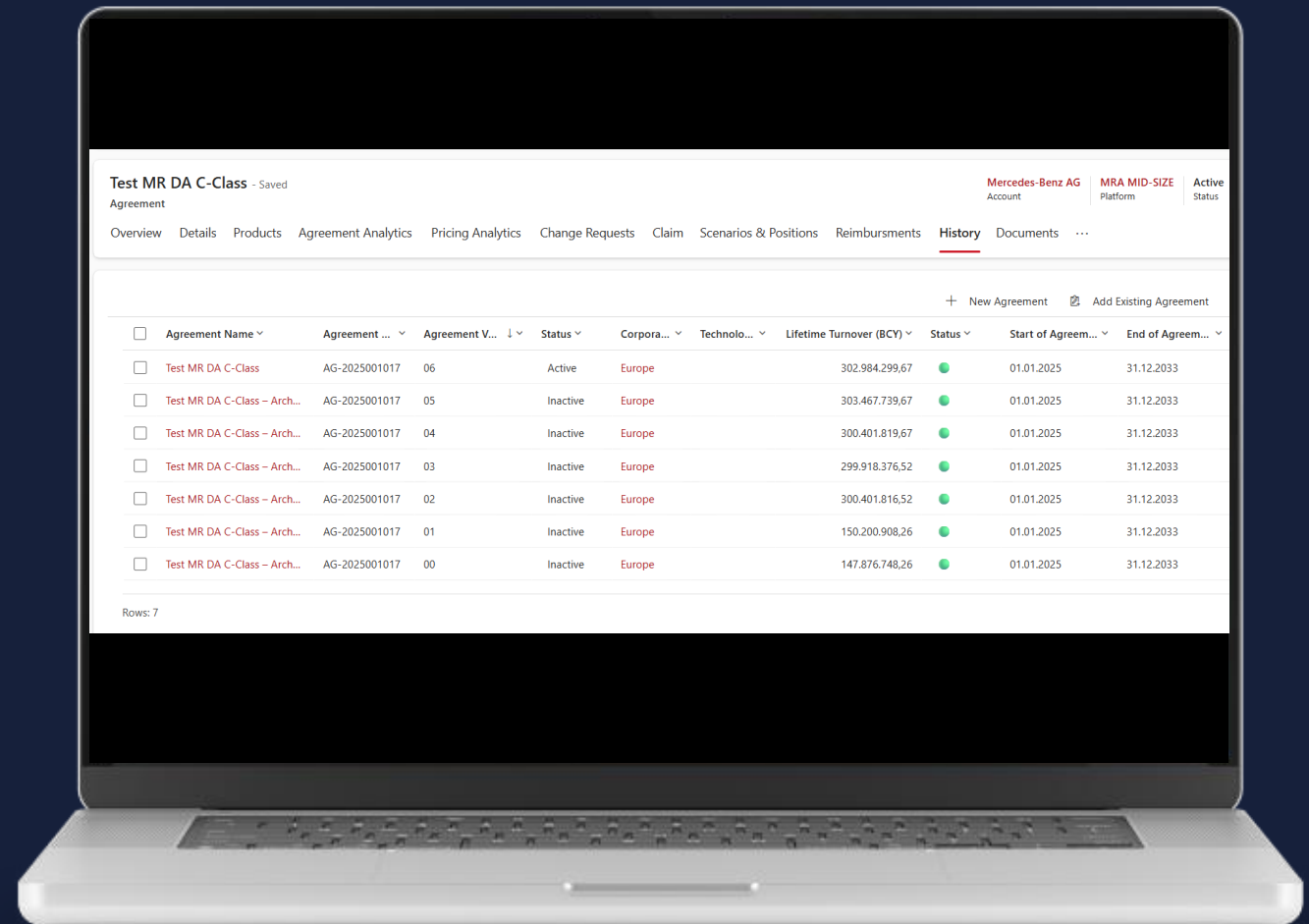
- Full copy of selected scenarios for quote to ensure full traceability w/o manual data entry
- Automatic creation of quotation documents
- Configurable approvals
- Transition of quote to agreement via full copy & full traceability





## Agreement

- Agreement contains all information from nominated quotation
- Scenario data directly available on agreement
- Status handling of agreement version via draft / freeze



The screenshot displays a web application interface for managing agreements. The title is "Test MR DA C-Class - Saved Agreement". The user is logged in as "Mercedes-Benz AG" with roles "MRA MID-SIZE Platform" and "Active Status". The navigation menu includes Overview, Details, Products, Agreement Analytics, Pricing Analytics, Change Requests, Claim, Scenarios & Positions, Reimbursements, History (selected), and Documents. There are buttons for "+ New Agreement" and "Add Existing Agreement".

<input type="checkbox"/>	Agreement Name	Agreement ...	Agreement V... ↓	Status	Corpora...	Technolo...	Lifetime Turnover (BCY)	Status	Start of Agree...	End of Agree...
<input type="checkbox"/>	Test MR DA C-Class	AG-2025001017	06	Active	Europe		302.984.299,67	●	01.01.2025	31.12.2033
<input type="checkbox"/>	Test MR DA C-Class - Arch...	AG-2025001017	05	Inactive	Europe		303.467.739,67	●	01.01.2025	31.12.2033
<input type="checkbox"/>	Test MR DA C-Class - Arch...	AG-2025001017	04	Inactive	Europe		300.401.819,67	●	01.01.2025	31.12.2033
<input type="checkbox"/>	Test MR DA C-Class - Arch...	AG-2025001017	03	Inactive	Europe		299.918.376,52	●	01.01.2025	31.12.2033
<input type="checkbox"/>	Test MR DA C-Class - Arch...	AG-2025001017	02	Inactive	Europe		300.401.816,52	●	01.01.2025	31.12.2033
<input type="checkbox"/>	Test MR DA C-Class - Arch...	AG-2025001017	01	Inactive	Europe		150.200.908,26	●	01.01.2025	31.12.2033
<input type="checkbox"/>	Test MR DA C-Class - Arch...	AG-2025001017	00	Inactive	Europe		147.876.748,26	●	01.01.2025	31.12.2033

Rows: 7

# CHALLENGES & SOLUTIONS

## PROJECT



Project framework contract only available as document in contract management systems



Agreement maintained as object in CRM

Current agreement status maintained in EXCEL in isolated part life cycles



Agreement incorporating products, volumes, price, specifications, reimbursements, investments, references

Significant manual maintenance effort for sales to keep agreement up-to-date



Automatic creation of agreement out of nominated quotation and minimum maintenance effort by versioning and auto-population of data

No automatic comparison of agreement to actual, plan, market forecast

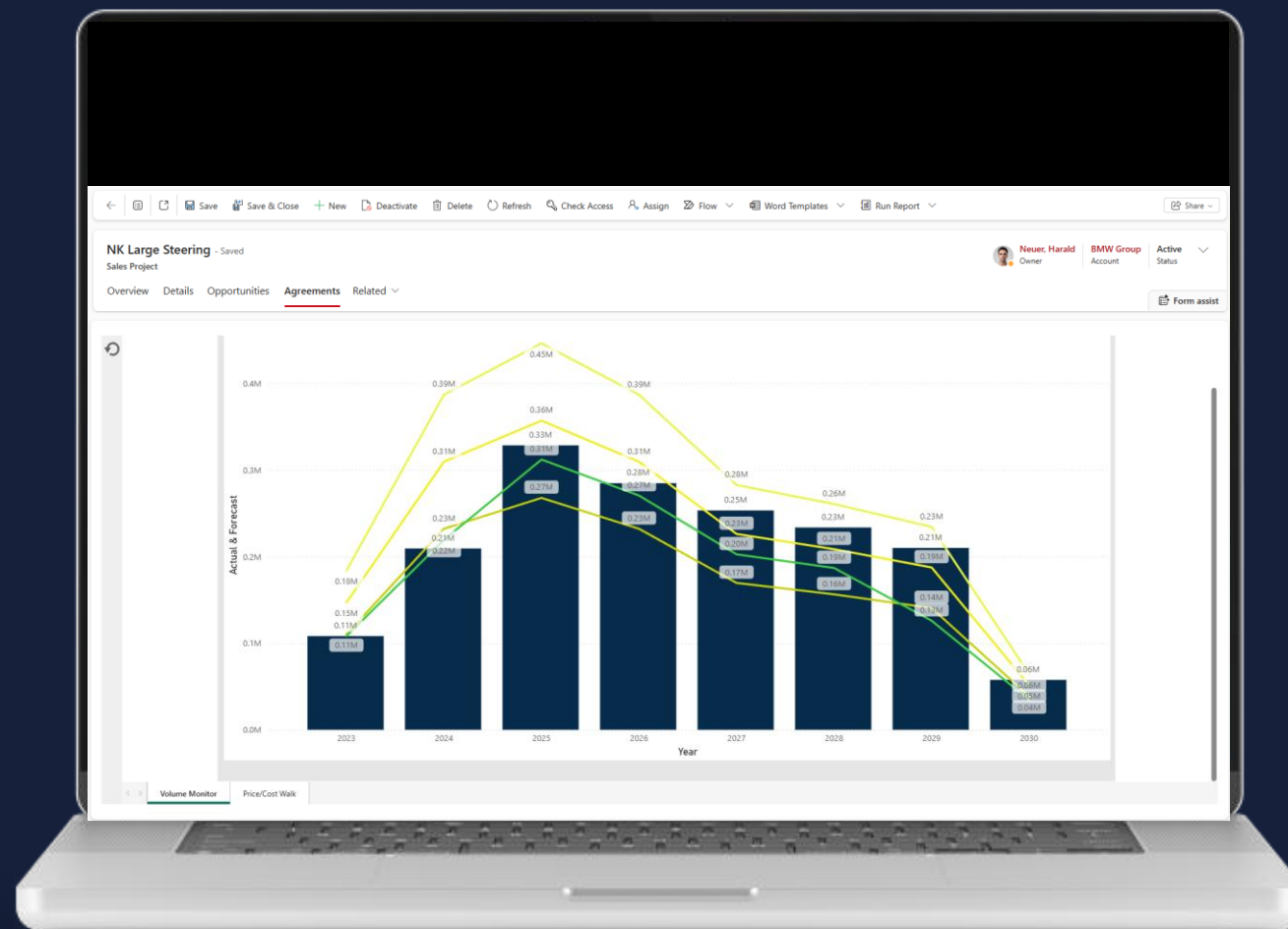


Agreement can be continuously tracked against actuals, plan and market forecast



# Project

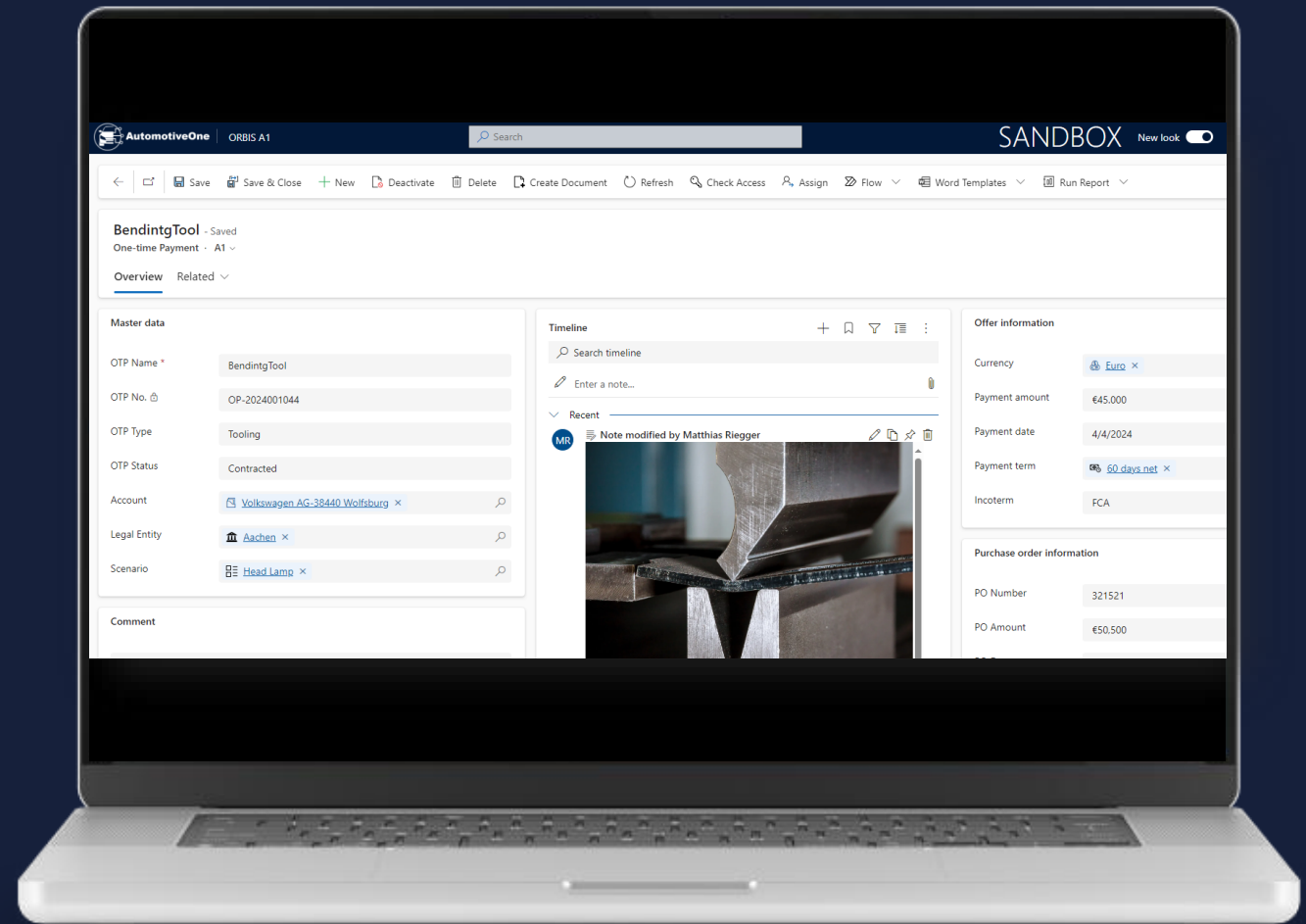
- Umbrella projects to cover staggered nominations with common technological baseline





## Reimbursements

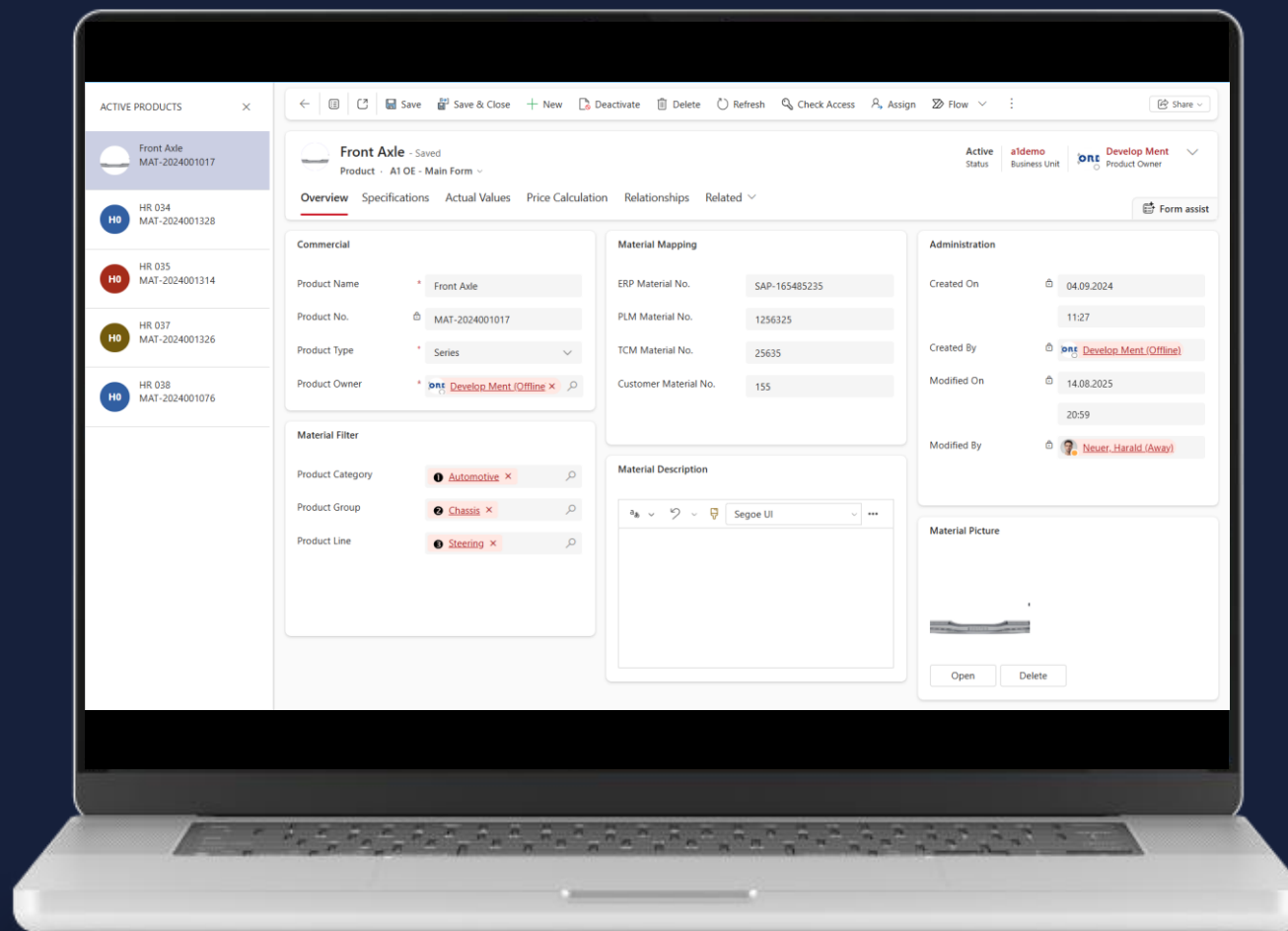
- Integration of reimbursement types from prototypes to royalties, including type specific configuration
- Application of payment types milestone billing, lump-sum & amortization
- Relation to serial product for amortization tracking





# Product

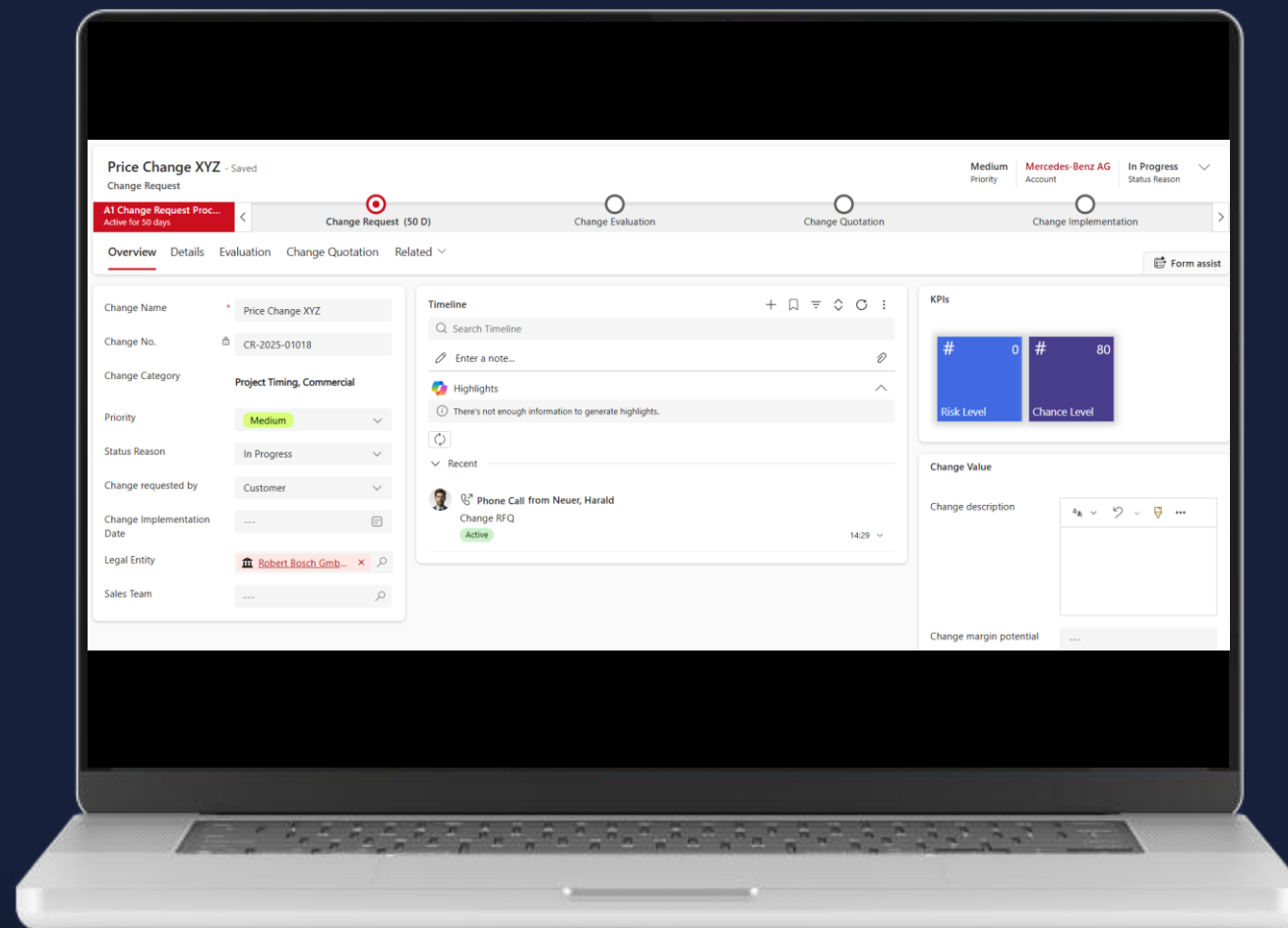
- Product catalogue management across CRM, PLM, SAP
- CRM in leading or consuming role





## Change

- Flexible integration of alternative or combined change request types
- Distinct traceability without additional manual data entry
- Historization instead of versioning simplifies overviews for user



# CHALLENGES & SOLUTIONS SERIES



No structured approach to identify, evaluate and process claims



Best practice process with phases mirroring degree of implementation

Inaccurate forecasting and inconvenient reporting of claims



Transparent analytics for target, forecast and actual and state of the art reporting portfolio

Missing collaboration for claims



Claim process incorporates other departments – Teams and SharePoint serve as collaboration hub

Missing preparation of negotiation strategy

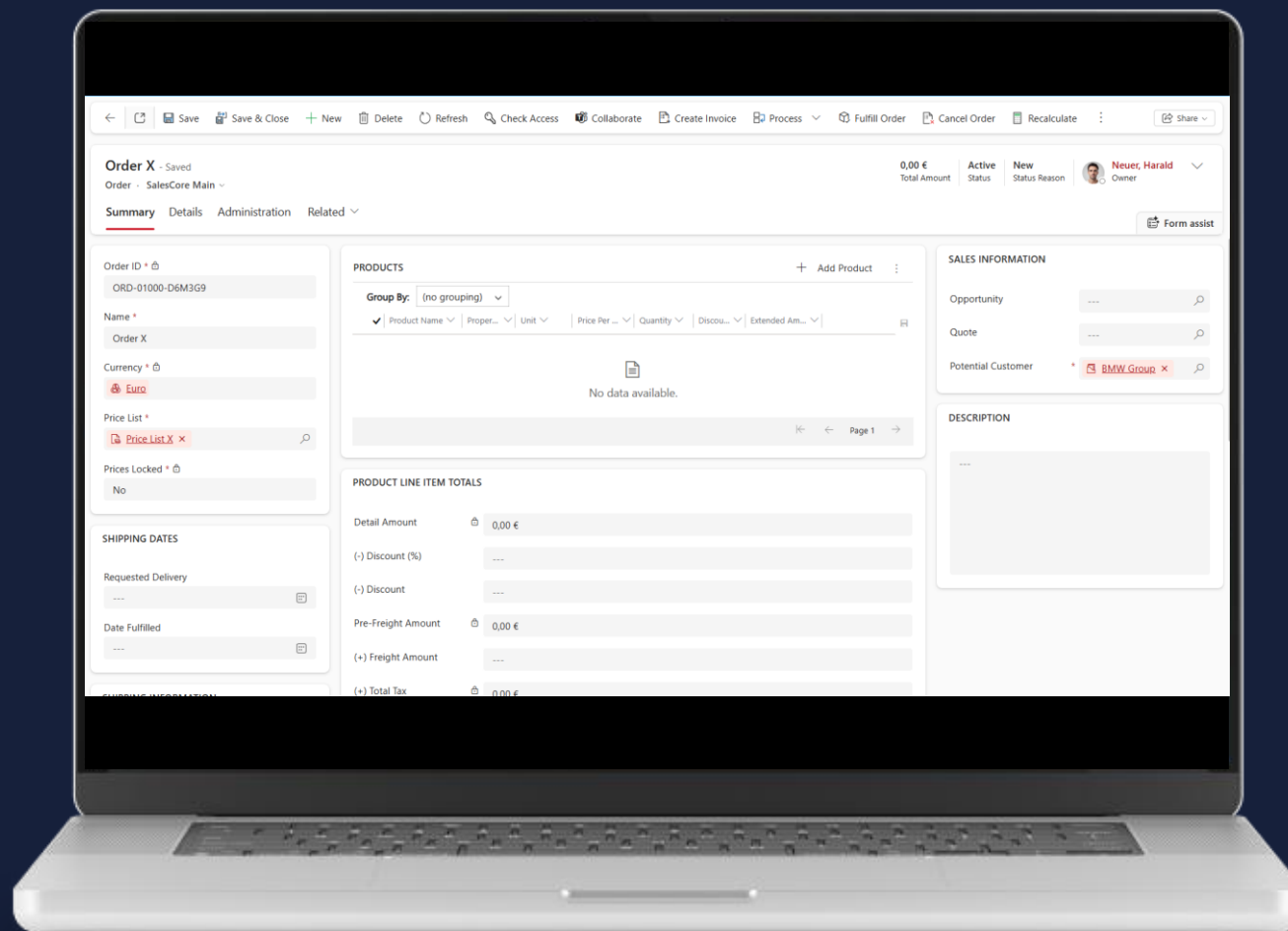


Best practice negotiation strategy board for major claims



# Order

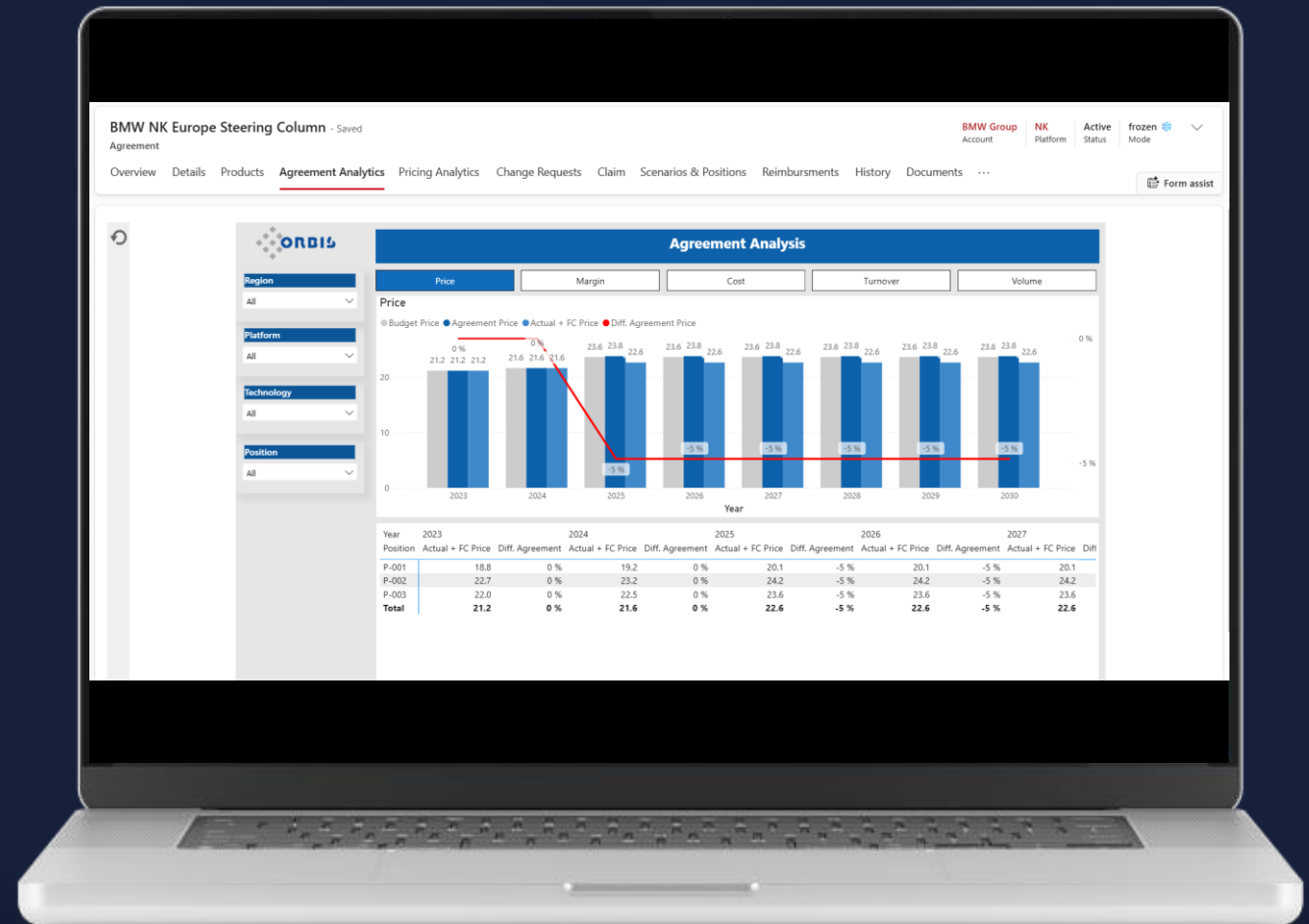
- Order management fully synchronized to SAP
- Enhancement by Purchase order reading via AI





# Monitoring

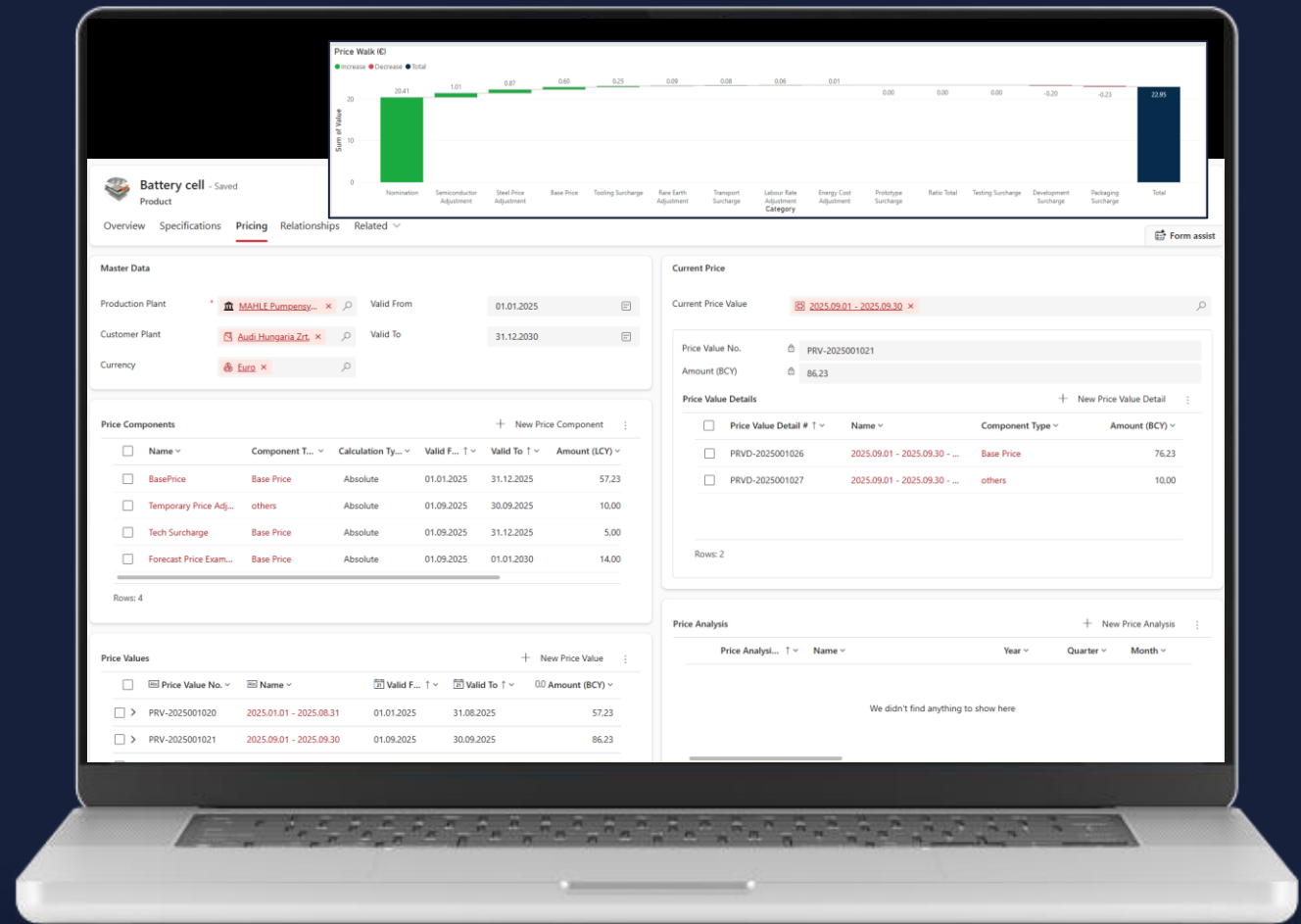
- Comparison of agreement version for all volumes and commercials
- Baseline for claim and provision management
- Minimized effort for reporting and preparation of customer meetings





# Price

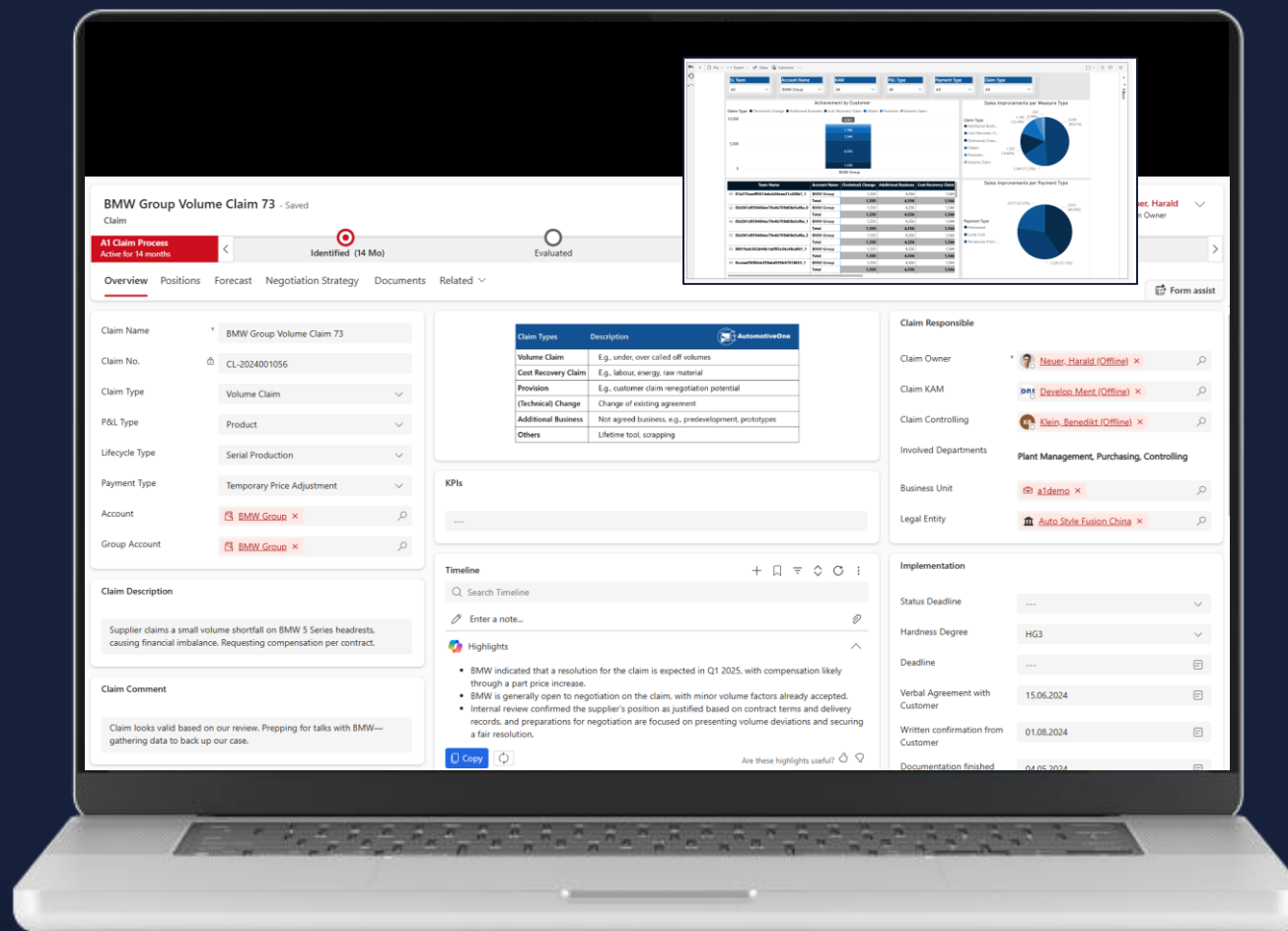
- Full transparency and comparability of prices and early identification of price deltas
- Sales prices secured in centralized database
- Transparency about references utilized in pricing strategy





# Claim

- Best practice process with degree of implementation logic
- Claim process incorporates other departments – Teams and SharePoint as collaboration hub
- Transparent analytics for target, forecast and actual and state of the art reporting portfolio





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HOW TO START / GET IN TOUCH

# GET IN TOUCH

» You can contact Patric Schuh directly to discuss your options

**Patric Schuh**  
Sales Specialist

Phone: +49 (152) 545 389 91  
Email: [Patric.Schuh@orbis.de](mailto:Patric.Schuh@orbis.de)



**ORBIS SE**  
Nell-Breuning-Allee 3-5  
D-66115 Saarbrücken

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Board of Management: Stefan Mailänder (Board spokesman),  
Damien Schirrer, Frank Schmelzer  
Chairman of the Supervisory Board: Ulrich Holzer

