



Client Success

M&M INTERNATIONAL
MANUFACTURING

M&M INTERNATIONAL BUILDS A SCALABLE SALES ENGINE WITH CREATIO AND NET AT WORK



CHALLENGE

Following a recent acquisition and the founder's retirement, M&M International needed to quickly move from founder-led, spreadsheet-driven selling to a team-based, data-driven commercial model with real pipeline visibility for ownership.

SOLUTION

M&M partnered with Net at Work to implement Creatio CRM, tightly integrated with Sage 100 in the Cloud at Work environment, creating a right-sized, easy-to-use platform that centralizes customer, quote, and pipeline data for the entire team.

RESULTS

- Consolidated customer, contact, and opportunity data into one shared, searchable system.
- Gave leadership and stakeholders clear, real-time visibility into pipeline and sales performance.
- Gained a proactive partner who designs, tunes, and supports the solution.
- Enabled a new sales team to collaborate, follow up, and grow accounts using consistent processes.

A STEADY FORCE IN THE MED-TECH SUPPLY CHAIN

For more than three decades, M&M International has been a quiet force in the medical device supply chain. From its headquarters in New Jersey and its operations in Korea, the company manufactures stainless steel tubing used in a wide array of medical devices and industrial equipment. It's a high-volume, low-margin world where reliability, responsiveness, and quality matter as much as price.

For most of those 30-plus years, M&M grew under a highly technical, hands-on founder who knew the products, the customers, and the market inside out. He handled nearly all of the selling himself and kept a remarkable amount of institutional knowledge in his head, his inbox, and a handful of spreadsheets. That model worked well for a long time.

The inflection point came when another company acquired M&M and the founder retired. The fundamentals of the business were strong, but the commercial side suddenly needed to look very different. The new owners wanted clear pipeline visibility and repeatable processes. Customers still expected the same personal attention. And for the first time, M&M was building a dedicated sales organization.

That's when Chief Commercial Officer Chris Pleibel joined the company and turned to Net at Work and Creatio CRM to help M&M grow its commercial operations without losing the strengths that made it successful in the first place.

HITTING AN INFLECTION POINT

Chris describes M&M as a "33-year-old start-up," a company with deep expertise and loyal customers, but a commercial operation that suddenly needed shared structure and visibility.

For years, the details that matter most to selling, including contacts, open quotes, and customer context, were scattered across email threads and spreadsheets, and getting a complete picture often meant going straight to the owner. After the acquisition, that approach couldn't support what came

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next. Chris stepped in as M&M’s first formal salesperson and quickly built a team of five additional reps, those “ask the owner” workflows no longer fit the reality of how the business needed to operate.

Suddenly, the company needed a shared view of sales activity: who was talking to whom, which quotes were still in play, and where opportunities were stalling. But pulling that kind of picture together from Sage 100, Outlook, and spreadsheets became a weekend project for Chris.

The goal wasn’t to overhaul what worked. It was to capture decades of know-how in a system the team could share, so M&M could scale the sales organization with confidence.

A SHARED VIEW OF SALES ACTIVITY

M&M already relied on Sage 100 for ERP, hosted in a secure environment by Cloud at Work. Sage 100 handles orders, inventory, production, and billing. What M&M lacked was a true CRM: a place to manage prospects, track activity, and understand the quote-to-order funnel at a glance.

Chris had worked with Salesforce in previous roles and knew what a large, powerful CRM platform could do, and the overhead involved in maintaining it. “That level of complexity simply doesn’t make sense for us,” he explains. “We needed a sales tool that would power our team without overpowering our resources.”

Creatio strikes that balance. It offers a modern interface, strong workflow capabilities, and an affordable entry point. Just as important, M&M could start with a focused set of capabilities such as: accounts, contacts, opportunities, and basic quoting – and expand as the team and data mature.

Net at Work, already a trusted advisor around Sage 100 and Cloud at Work hosting, recommended Creatio and helped M&M think through how to design a CRM that fits the way they actually sell.

RIGHT-SIZED CRM

Net at Work worked with M&M to design a Creatio environment that aligns tightly with Sage 100. Customer records, contact information, recent order history, and key metrics flow from Sage into Creatio, giving sales reps a complete picture of each account without forcing them to toggle between systems. Opportunities and leads live in Creatio, where the team can track touches, log notes, and manage follow-ups. When an opportunity is ready to formalize, the team moves into Sage 100 for quoting and order processing.



That integration is particularly important in M&M's world, where pennies per foot matter. Reps can see whether a customer has outstanding orders, how their volumes are trending, and which product lines they buy most often. It's easier to spot genuine growth opportunities and avoid chasing deals that don't make sense commercially.

Net at Work's knowledge of both sides of the house, including Creatio on the front end and Sage 100 on the back end, meant M&M didn't have to translate manufacturing realities into technical requirements. "The Net at Work team is awesome to work with — they are ridiculously responsive," says Chris. "And they kept the implementation grounded in business outcomes."

EMBRACED BY THE TEAM

Net at Work configured Creatio to match the team's day-to-day rhythm. The sales cycle in M&M's space can be long, with quotes and projects evolving over months. Creatio now gives the team simple, consistent stages and fields that reflect that reality. Reps can see where each opportunity stands, what the last touch was, and what needs to happen next.

"If the system is clunky, salespeople will work around it," Chris says. "Because Creatio fits the way we operate, my team actually lives in it."

The Outlook integration turned out to be a small but important win. Reps live in email; with Creatio connected, those messages, meetings, and attachments roll into the customer timeline with minimal effort. Over time, that builds a rich, shared history that outlives any individual inbox.

For Chris, Creatio has become the way he runs the commercial organization. "For the first time, I can walk into a board meeting with a clean view of pipeline, probabilities, and timing that I actually trust."

PARTNERSHIP MAXIMIZES VALUE

Like any meaningful system change, M&M's Creatio journey had its learning curve. There were nuances in how data should flow, questions about what to measure, and moments where the team needed help interpreting options.

Net at Work stayed close throughout. "When we hit bumps early on, Net at Work jumped in fast, simplified things, and got us back on track," says Chris. "That kind of responsiveness builds trust."

Today, M&M is on a customer experience plan with Net at Work, giving Chris and his team a predictable way to request enhancements, adjust dashboards, and explore new capabilities as they are ready. They know they are only scratching the surface of what Creatio can do, and they have a partner who can help them unlock those features at the right pace.

M&M International still looks very much like the company its founder built: focused on quality, proud of its role in the medical device supply chain, and careful with every dollar. The difference now is that its commercial engine is no longer locked in one person's head. With Creatio, Sage 100, Cloud at Work, and Net at Work in their corner, the company has a shared, scalable way to grow — and the visibility to prove it.

"Creatio is easy to configure, powerful, and the right size for us today, but it still gives us room to scale into more capabilities over time," Chris concludes.