



James M. Pleasants Co.

Client Success Story

HVAC manufacturer's representative improves customer responsiveness and internal efficiencies with data-centric CPQ initiative.

JMP's mission is to promote and provide engineered products and solutions for energy efficient systems that maximize the productivity of people and buildings.

Challenge

As an organization, the hand-off of project orders from sales to operations was based on disparate processes, driven by individual preferences, with limited visibility into any data about what they were quoting. The "controlling" document was an uncontrolled Excel file called a JCS or Job Control Sheet. The application of the JCS was inconsistent across regions and salespeople.

Managing the information around these large orders was problematic and both time and resource intensive. The new system would make it more streamlined for the organization to function as a single entity working towards the same goals, in a consistent manner.

Another major goal, which is being more emphatically requested by their manufacturers, is to gain clear visibility into forecasts by knowing exactly what is being quoted and understanding the exact status of each and every order in the sales cycle.

CLIENT

James M. Pleasants Co.

PARTNER

Experlogix

PRODUCTS AND SERVICES

Microsoft Dynamics 365, CE, Field Service, Finance & Operations, Power Automate, Power Apps and Power BI

CORPORATE DETAILS

- To enable each of their outside sales people to sell more effectively and with higher margins throughout their territories
- To enable them to support more inside sales activity without having to hire more people
- To enable them to digitally leverage more channels for sales opportunities
- To improve their effectiveness in the Order-to-Cash cycle

Overall, JMP was striving to be a more data-centric organization that could be more responsive to their customers, with the goal of being able to continue to grow, either by adding more products and/or more territory. In the end, JMP really wanted to validate that their assumptions about how and why and when they were successful. They believed that by creating more consistency and efficiency, they could dramatically improve their performance and improve on all levels of sales.

Solution

Previously, the only aspect of a “business system” that JMP had was on the ERP side. The legacy on-premises Microsoft Dynamics ERP instance they had was coming to the end of its support. They considered simply updating ERP, but during the evaluation process realized that there was much more to be gained by also implementing a full CRM solution.

As they modified their approach to include the sales side of the organization, it became quickly evident that one of the most critical aspects of the new Enterprise Solution would be the ability to quote. JMP turned to Experlogix and engaged in a Proof-of-Concept, which clearly demonstrated the power of CPQ, and knew it would become an important element in their new processes.

JMP subsequently embarked on a digital transformation built on Microsoft’s Dynamics 365 platform, leveraging Customer Engagement, Field Service, Finance & Operations, Power Automate, Power Apps and Power BI technologies. Along with Experlogix as their CPQ solution tightly integrated with Microsoft Dynamics.

The new solution is designed for the following:

- To enable each of their outside salespeople to sell more effectively and with higher margins throughout their territories.
- To enable them to support more inside sales activity without having to hire more people.
- To enable them to digitally leverage more channels for sales opportunities.
- To improve their effectiveness and efficiency in the order-to-cash cycle.



Result

As a result, there has been a major impact on all salespeople – inside and outside – and across the organization. Our increased efficiency has led to more quotes with less errors. Our goal is to increase each salesperson’s annual sales revenue by over \$200,000. Now, with Experlogix CPQ in place, we are well on our way to achieving that goal.

Also, it has started to affect the workflow and there is now a push in two of their four regions for some work to be more centralized. There are technical sales engineers that have been able to fully embrace the CPQ solution within CE and are now so much more efficient that they are capable of handling quotes for multiple offices.

The JMP team is actively engaged in specifying environmentally efficient and cost-effective solutions for HVAC and plumbing projects. Experlogix CPQ helps them improve their bottom line, increase customer satisfaction and generate real ROI through multiple benefits that only Experlogix can bring to their business.



Want to learn more?

Speak with one of our experts.


Get Started



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Martin Messick
IT Manager

