



# Freedom Concepts

## Customer Success Case Study



### Freedom Concepts Adopts Experlogix CPQ for Better Quoting Reliability and Accuracy

For more than 30 years, Freedom Concepts has built adaptive bikes and alternative seating solutions for the complex rehabilitation market, serving customers with disabilities such as cerebral palsy, traumatic brain injury, spina bifida, and more.

The company's products serve customers with a vast range of mobility needs, driving a high need for customization in the quoting process. This personalization also makes it critical that orders are accurate, since any mistakes could lead to discomfort or limit the mobility experience that Freedom Concepts products deliver.

To meet these now and make operations more scalable, the company recognized the need to replace its old system with a modern CPQ solution.

#### Challenge

"Our previous product configurator was no longer being supported, and it had problems and constraints to begin with, so the jump to another solution was something we needed to do," said Colin Bock, mechanical engineering technician at Freedom Concepts. "We started looking for more functionality to help our sales team and more easily configure our products."

#### Product

- Experlogix CPQ

#### Benefits

- High level of flexibility for creating rules and expressions
- More reliability and developer support
- A more user-friendly interface
- Ability to add images to quotes

#### Tech

- Microsoft Dynamics 365 Sales

Freedom Concepts' old configurator was not only cumbersome to use, it also left significant gaps in processes that depended on moving data between the old CPQ software and the company's CRM, Microsoft Dynamics 365 Sales.

The old configurator sometimes missed data that needed to be transferred, meaning that generated quotes could be incomplete.

It also cost sales valuable time throughout the quoting process itself. One problem was that the old tool had no ability to re-configure a quote that had already been created. This meant that sales would either need to start a new quote from scratch or manually adjust every line item when customers requested changes.

The lack of developer support was the final straw. The company's old tool went down for 22 days during the first half of 2022, averaging three days of downtime per month.

To fix these problems and evolve in line with its customers' needs, Freedom Concepts needed a more reliable CPQ solution that could easily handle the highly customized configurations that needed to be produced.

The Freedom Concepts team identified a few key requirements that the new solution would need to satisfy.

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- More reliability and developer support
- A more user-friendly interface
- Ability to add images to quotes

Throughout the evaluation process, scalability also emerged as an important consideration. Although the company wasn't ready to implement it yet, the ability to build a dealer portal later became a very attractive feature.

## Solution

After we went live, we realized that Experlogix provided functionality that we hadn't even considered when we were shopping for a new CPQ solution," said Iain Friesen, mechanical engineer at Freedom Concepts. "The Experlogix training and support we received opened the door to more utilization of the software. It provides consistency and reliability from sales all the way down to the production floor."

The company turned to Experlogix for its more user-friendly interface and ability to handle complex quoting needs. Because the sales team was accustomed to a more complex solution, onboarding went smoothly with some training and support from the Experlogix team.

Freedom Concepts now uses Experlogix CPQ for its two product lines, with more than 100 rules and more than 2,000 different options. With Experlogix, it's easy for the

company's engineers to create new rules and logic as the number of configuration options expands or as new needs arise. Plus, Experlogix saves dozens of hours by removing the need to re-create quotes from scratch when changes have to be made.

With its seamless integration with Microsoft Dynamics Sales, Experlogix allows for a complete flow of information between CRM and CPQ, making it easy to save accurate information back to the customer's entry anytime an order is created.

The Freedom Concepts team also plans to expand its utilization of Experlogix CPQ to allow dealers to access the powerful product configurator functionality that they've benefited from internally – this would not only make it easier for the company's partners to sell for them, but also add consistency across all sales channels.

"Since switching to Experlogix we have not ever been down and unable to quote for even an hour," said Corey Thompson, General Manager at Freedom Concepts. "That reliability to us is hugely important and appreciated."



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**Colin Bock**

Mechanical Engineer

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