



Instant InfoSystems

Customer Success Case Study



Technology VAR Cuts Proposal Production Time by 80 Percent

Instant InfoSystems cites a policy of “absolute customer commitment” as the cornerstone of their success.

Their award-winning service model produces strong customer loyalty and support contract renewal rates of more than 90 percent annually.

Challenge

Proposal response time and accuracy were areas that Instant InfoSystems identified to improve for their clients. Previously, sales reps used spreadsheets to calculate the prices and costs of products and services. Once figures were totaled, the rep manually enter the calculated prices into Microsoft CRM. The procedure averaged 30 minutes or more and was open to human error. “The whole process was very manual and susceptible to mistakes” says Dan Nishita, IT Administrator.

Product

- Experlogix CPQ

Benefits

- Faster quote-to-orders
- Streamlines complex price and cost scenarios
- Quick turn-around of support renewal quotes
- 100% order accuracy
- Calculates real-time sales taxes
- No longer relies on cumbersome spreadsheets

Tech

- Microsoft Dynamics 365

Solution

“We needed a configurator that populated Microsoft CRM with prices and costs based on predefined rules and formulas,” continues Nishita. “Also, it had to enable our sales team to create quotes efficiently and accurately. Of the configurators we considered, only Experlogix could provide the flexibility and functionality we needed, along with deep integration to Microsoft CRM.”

Instant InfoSystems took their complicated formulas and a multitude of proposal scenarios, and easily transferred them into Experlogix’s Formula and Rule Designer. According to Nishita, “Experlogix accommodated everything we threw at it – including real-time tax calculations from a web-based provider.”

Result

Experlogix now enables Instant InfoSystems to extend their responsive service to their sales staff. By increasing quote accuracy to 100% and reducing manual effort, Instant InfoSystems creates their complex product and service proposals in just five minutes – saving more than 25 minutes per quote.



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Dan Nishita
IT Administrator

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