

Priva

Customer Success Case Study



Enhances Customer Experience with Experlogix CPQ for Dynamics 365

Sustainability has become one of the most challenging goals for businesses and governments alike. Legislative measures in the United Kingdom and Europe have pushed organizations to reach net zero by 2050. Priva, a developer of climate control solutions for commercial buildings and high-tech greenhouses, enables organizations to reach their sustainability goals while drastically reducing costs.

Priva's products and services help its customers manage some of the most sustainable buildings in the world, and although not all orders are complex, every installation is unique to the customer's needs. Factors ranging from the weather to the size and shape of the building or greenhouse can impact the most optimal climate control solution and strategy.

Challenge

"We were missing a lot of needed functionality in our calculation tools," said Kees van der Kruk, Manager of Fulfillment Operations at Priva. "We also didn't have the capability to process projects to orders. We custom build a lot of our solutions, and that makes it essential to have documents like the bill of materials (BOMs), but creating these documents required a lot of manual effort. The implementation of a new ERP system also challenged us to re-evaluate our diverse landscape of tools for quoting and ordering."

Product

- Experlogix CPQ

Benefits

- Accurate, highly customizable orders
- A guided two-phased implementation approach
- The entire process and documents delivered to customers are much clearer
- Order are more accurate and can be adjusted more quickly before production

Tech

- Microsoft Dynamics 365 Sales

Priva's previous system relied on custom tools built for Microsoft Dynamics AX. The company planned to transition to Microsoft Dynamics 365, which would also facilitate the adoption of more standardized tools that could better meet the need for customizability and scalability. The old system also required salespeople to navigate through multiple product and pricing spreadsheets to configure an order. This took up valuable time, led to inaccuracies and hurt the overall customer experience.

HSO, an Experlogix for Dynamics 365 partner specializing in helping organizations implement business technology solutions, proactively introduced Priva to Experlogix CPQ.

"We went through an extensive research and selection process. We asked vendors to show us they could really handle our requirements for a CPQ solution," van der Kruk continued. "When we saw how we could use their solution for our products and services, we knew Experlogix was the answer."

Solution

Experlogix CPQ for Microsoft Dynamics 365 Finance and Operations provided the tools that Priva needed to deliver accurate, highly customizable orders, easily and consistently.

Priva adopted a two-phased implementation approach, starting by giving one of its sales offices access to Experlogix for a selection of its products. This initial phase focused on a small product rollout, giving Priva's employees time to learn the basics of Experlogix with a small, focused set of products. At the same time, they could work alongside Experlogix's engineers to facilitate implementation and add products to the configurator.

By the second phase, Priva expanded usage of Experlogix across its locations globally, as well as for its external partners and dealers — for the company's full range of products.

"Experlogix's guided approach to implementation really helped," said van der Kruk. "It enabled us to focus on our strengths: using our product knowledge to build models in CPQ."

With the success of its initial implementation, Priva plans to expand Experlogix usage to other departments and take advantage of the cascading benefits CPQ can provide. Experlogix CPQ's out-of-the-box integrations with the full Microsoft Dynamics ecosystem will make it easier to onboard other divisions and tailor the solution to the needs of those specific departments.



Result

The new process also ensures that order information can automatically be transformed into key documents like the quote, improving the customer experience while significantly reducing the complexity of the sales process.

“The entire process and documents we deliver to customers are much clearer now,” van der Kruk said. “Whether the sale is being handled internally or through one of our partners, it’s always clear what the configuration is. This not only makes our orders more accurate, it allows us to more quickly adjust them before anything moves to production...that stops a lot of confusion and prevents customers from becoming frustrated.”



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Kees van der Kruk
Manager of Fulfillment Operations

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