



ReVision Energy

Customer Success Case Study



ReVision Energy Amps Up Sales Process for Renewable Energy with Experlogix CPQ

The renewable energy market has undergone significant growth over the last decade; even as other forms of renewable energy have emerged, solar remains a dominant force in the market. In the United States, the Energy Information Administration projects that solar will account for the majority of energy generation growth in the United States.

For ReVision Energy, these shifts in the market meant it needed to expand its product and service offerings to remain competitive. The company initially focused on home and commercial solar energy systems. With more companies offering solar, however, meeting ReVision's revenue growth goals would mean staying ahead of the competition by addressing a wider range of customers' energy needs.

Now, the company offers a range of energy solutions, including solar battery back-ups, air-source heat pumps and electric vehicle recharging equipment — this is where gaps in the existing sales process became especially clear.

Product

- Experlogix CPQ

Benefits

- Customer information can be entered once and reused across multiple technology quotes
- Easier to calculate components such as parts and labor
- Solar systems, heat pumps and batteries can be quoted side-by-side

Tech

- Microsoft Dynamics 365 Sales

Challenge

ReVision Energy could expand its portfolio, giving customers more ways to buy its products, but this would also add to the complexity of its orders. Once ReVision expanded the products it offered, it saw many customers who wanted to buy multiple technologies.

This presented a few key challenges:

- **Order Complexity:** As customers became interested in more of ReVision Energy's products, the inflexibility of its old CPQ tool made it difficult to handle orders with added complexity.
- **Manual Administrative Work:** The old CPQ solution couldn't easily share information with the company's CRM system, meaning that the sales team needed to manually copy and enter data.

With more complex orders, ReVision started to see more manual work needed to successfully close a sale, and staying with the old system would mean that these problems would only grow alongside increasing customer demand for its products.



Solution

When ReVision Energy began considering CPQ solutions, Experlogix stood out for its complete integration with the Microsoft Dynamics 365 product suite.

And, as ReVision's team started to see the capabilities in Experlogix, CPQ proved that it would be able to handle the growing complexity the company faced, while also providing the scalability to drive even more efficiency and revenue in the future.

"When we're putting together orders for multiple technologies, that's where we really see the time savings," says Nate Bowie, Vice President of Sales at ReVision Energy. "There's information we put in once for a customer, and then we can easily create a quote for a solar energy system, heat pump and battery all side-by-side. It's also much easier to calculate things like parts and labor in Experlogix."

Following the success of the initial implementation, ReVision plans to expand the way it uses Experlogix by making CPQ available to its services team. This would allow for easier configurations for customers looking to expand a solar installation, or for other services like maintenance. The company also plans to use Experlogix to provide a platform for customer self-service, so that customers can design their own systems from an online site.

"When I saw the capabilities in Experlogix, I knew it was exactly what I had been wanting," continued Bowie. "We still have room to grow in terms of how we use it, but it's already making it easier to keep up with our customers' needs."



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Nate Bowie

Vice President, Sales

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