



Reliance Home Comfort

Customer Success Case Study



Company improves process efficiencies, eliminates errors, and enhances perception of professionalism.

Reliance sells, finances, and rents home comfort systems. It prides itself on its 1,500 member staff's professionalism and expertise in providing the highest level of quality and consistency in service.

Challenge

Small, local companies typically dominate the relatively low-margin heating & air conditioning, and water heating products and services market. Reliance Home Comfort, however, has operation centers spread across four Canadian Provinces, supported by one of the largest licensed technician networks and in-home product-quality management teams that perform ongoing quality audits.

"We're impartial in recommending the best products for the job, and take the risk and worry out of product ownership so customers can fully enjoy their homes," says John Pavkovic, Director of Technology Solutions, Reliance Home Comfort.

Reliance's 75-agent sales force does in-home assessments to best match customer requirements with the proper configuration of systems and components. In business over 40 years, the field sale force had traditionally relied on binder catalogues to produce quotations.

Product

- Experlogix CPQ

Benefits

- \$250,000 annual savings in improved efficiencies and error reduction
- Maintained by business users rather than IT
- Strong sales agents' buy-in
- Positive customer response to proposal/quote process
- Faultless migration from on-demand pilot to on-premise solution
- Enhanced customer perception of sales agents' professionalism

Tech

- Microsoft Dynamics 365 CRM/ERP

The process worked well enough for years, but did not reflect the growing company's commitment to superior professionalism. Besides breaking direct one-on-one customer engagement to create a quote, the entire proposal production process was inefficient and error prone.

In late 2011, Reliance Home began its search for a better quoting solution.

Solution

"We looked at various configurator solutions," Pavkovic states. "Some vendors wanted to sell us big, high-end, expensive systems with lots of features. A lot of what they offered was irrelevant to us. Others only sold on-demand solutions, but we already have a data center."

Reliance wanted a system that could easily integrate with Microsoft Dynamics CRM 2011. "Some configurator vendors said they could make the link – but you still had to uncurl the integration problem. We wanted a solution that was on one platform."

Result

The whole process starts when a customer makes a phone or web inquiry. All initial information is captured in Microsoft Dynamics CRM. "When a Reliance agent makes a home visit, they launch Experlogix on their tablet directly from Dynamics CRM," Pavkovic states. "Agents are essentially on stage with their customers watching over their shoulders," Pavkovic says. "Experlogix definitely supports our emphasis on professionalism."

Experlogix's rules-based configurator ensures only compatible components and accessories can be considered when quoting complex systems. Sitting side-by-side, agents and clients can try various configurations to achieve the best price/performance for the customer.

When the configuration is complete and the quote is accepted, it's passed back to Dynamics CRM where it becomes an order; then is passed on to ERP for procurement. "We work from good data from the very beginning," says Pavkovic.

Experlogix is a good value," continues Pavkovic. "It has a strong – and growing – feature set. It is on the same platform. And it has a good price point."

Experlogix also provides both on-demand and on-premise solutions, "so we could quickly do an on-demand pilot, then transition seamlessly to on-premise," he says. "And they have a tight team. We always deal with people who can make decisions quickly."



The implementation and pilot went smoothly. “Experlogix provided wonderful support. They really helped us streamline our processes and improve efficiencies. We figure the system will annually save us \$250,000 in improved efficiencies and reduction of errors,” comments Pavkovic.

Feedback Reliance is getting from customers is very positive. “And we’re certainly pleased with the solution,” Pavkovic says. He is especially pleased in that Experlogix is maintained outside of IT by people who use it – “which is the way it should be.”

In addition, Pavkovic couldn’t be happier with the support Reliance has received from Experlogix. “Implementation is never just about the software. Your success is dependent on your vendor. A great product without a great partner is never going to be satisfactory. We’re fortunate to have a great vendor in Experlogix.”



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Director of Technology Solutions

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