



Swecon

Customer Success Case Study



Swecon Achieves Cloud Transformation with Experlogix CPQ and Microsoft Dynamics 365

Swecon Group is one of the longest standing sellers of construction equipment in the world, primarily serving Sweden, Germany, Estonia, Latvia and Lithuania.

The company has been an authorized dealer for Volvo Construction Equipment since 1946, and it has expanded its portfolio to include products and attachments from other top brands such as Merlo and Metso in the Baltic region. Today, Swecon supplies a full range of highly customizable heavy machinery, including wheel loaders, excavators, haulers and more, as well as attachments and supporting services.

Construction equipment can be configured based on a range of factors, from different types of hydraulic systems to a range of attachments and other customizable elements. Because Swecon Group represents some of the world's leading machinery companies, order errors can damage customers' perception for both its brand and those of the manufacturers that build its products.

As Swecon continued to expand, the limitations of its existing systems and processes became more apparent, leading to the search for a new CPQ solution.

Product

- Experlogix CPQ

Benefits

- Ease of use for sales teams
- Access CPQ from CRM
- Data imports from ERP
- Consistent, accurate orders
- Automatic pricing calculations

Tech

- Microsoft Dynamics 365

Challenge

For Swecon to continue fulfilling the needs of its customers, it needed to transform its systems and processes with modern tools.

“Our old configurator’s interface was old fashioned, and it couldn’t be easily updated,” said Eva Karlsson, IT Service Manager for Sales and Marketing at Swecon Group. “We wanted something that would give our sales team a centralized system to configure products, as well as save quotes and order information efficiently. At the same time, we needed more functionality from the configurator itself; the inflexibility of the old system had become too big of a headache.”

Early in the evaluation process, it became clear that cloud-based solutions would provide the flexibility that Swecon needed as it continued to grow business. The company’s old product configuration solution could not be easily updated or customized, meaning that the IT service team had limited options for building rules and dependencies. The complexity of the company’s products and limitations of the old configurator meant that sales spent a lot of time configuring orders, calculating prices and navigating different systems.

Swecon had one more major challenge to consider: As it looked for a new CPQ solution, it was also migrating ERP systems to Microsoft Dynamics 365 Finance and Operations. While this meant there would be drastic changes to both systems and processes, finding the right combination of solutions would create the foundation for more sustainable growth.



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IT Service Manager for Sales and Marketing

Solution

“When it came time, it was an easy decision,” said continued Karlsson. “From the users’ points of view, Experlogix was clearly the best choice.”

Swecon’s team turned to Experlogix CPQ when the team saw the expansiveness of its capabilities, its ease of use for sales teams and for its integration with Microsoft Dynamics 365, which drove both its CRM and ERP system. This meant that sales could easily access CPQ from within CRM, and any essential data could be pulled from ERP without going between different systems.

Experlogix implementation engineers helped Swecon group move forward with its initial project, helping to train Swecon’s key stakeholders and build the first set of models that would govern configurations. This allowed Swecon to begin learning the ins and outs of

Experlogix, while also setting an aggressive timeline for going live.

“Experlogix was a big part of our initial implementation, helping us to build our core configurations and the foundation for future growth,” said Henrik Sandberg, IT Manager at Swecon Group.

With Experlogix, the sales team can more easily and consistently create accurate orders. The integration with Dynamics CE gives sales all the data they need to configure an order, while the ability to pull metrics like net price and profit from Dynamics Finance and Operations, provides more visibility over sales performance.

Plus, there's less headache involved in saving data to both systems, saving valuable time during and after the sales process.

As Swecon Group delved more into Experlogix CPQ, the software's configurability became a huge factor. With the old system, it wasn't possible to create all the rules and dependencies needed for the company's products. With Experlogix, however, the team has the power to meet virtually any quoting need.

“Experlogix provides an open framework for you to build almost anything,” continued Sandberg. “The more you learn how to use it, the more you realize what you can do with it.”

Looking toward the future, Experlogix will help Swecon Group expand the range of brands that it sells. Since there is a complete flow of information between CRM, ERP and CPQ, data for new products can be created or imported once, and then shared with all other key systems — Swecon's team can then focus on building configuration rules that align with its sales strategy.

Swecon Group has built a legacy based on the quality of products it sells and the service it provides to customers. With its sales process updated for the digital age, the company can focus on growing that legacy and forging relationships with new customers and manufacturers alike.



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IT Manager

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