

UNICOM

Customer Success Case Study



Technology Provider Improves Quote Consistency and Visibility

UNICOM creates products and business solutions that solve a variety of deployment challenges, accelerate time to market, reduce ownership costs and increase business efficiencies.

Challenge

As a manufacturer that designs and builds server appliances and network equipment products, UNICOM had been successfully using Microsoft Dynamics™ GP as its ERP system for about 10 years in a model requiring little variation in product. As time has progressed, UNICOM has adapted to changing customer needs and now offers more configure-to-order sales with a higher degree of product and services complexity.

“Dynamics GP did have a basic configuration tool, but it did not have the flexibility we needed, or the ability to handle the kind of complexity we were starting to experience in our orders,” says David Klubock, UNICOM’s Dynamics GP Administrator. “The Dynamics GP configurator was also not available to our non-GP users in the sales department, who were working primarily out of the Microsoft Dynamics CRM application.”

“Previously, our sales staff was using a myriad of tools, such as Microsoft Excel spreadsheets, and everyone was working from individual cost sheets that were not necessarily linked to the most up-to-date source,” says Rob Sheriff, Vice President, Sales

Product

- Experlogix CPQ

Benefits

- Increased consistency in quotes and orders
- Web-based deployment for remote quoting flexibility
- Realtime integration with Microsoft Dynamics GP item master costs; assures accurate quotes anytime, anywhere
- Single configurator package for both Dynamics GP and CRM, ensuring corporate-wide quoting consistency and ease of maintenance
- Ability to handle product and services related component rules requirements

Tech

- Microsoft Dynamics 365

Operations. “So when new sales opportunities were submitted for approval, it took extra time to validate and correct costs associated with an order. And as a result, we were faced with both an impediment to the speed with which we could process orders, as well as the consistency in which orders were being presented to the pricing committee for approval.”

Solution

After a thorough review of configurator vendors, UNICOM chose the Experlogix Product Configurator for Microsoft Dynamics CRM and Dynamics GP as an integrated, easy to use solution that can consistently support both its order desk users and well as its sales staff users.

“Today we may get an order for a dozen of a given product that is a straight line SKU that we can build from a standard configuration, while others will be an order for a single item that will be built from a selection of a long laundry list of components and offerings that will result in a single configuration,” says Sheriff.

“We needed a configurator that could support all of our users no matter the Dynamics application they were working out of. While our Dynamics GP order desk users only need to use the Experlogix Configurator for a small number of orders that have complexity, our sales staff, working out of Dynamics CRM, use it extensively.”

Result

The sales staff can now use the Experlogix Configurator, combined with Dynamics CRM, to fully support their sales quoting process. Once a quote has been generated, a quote report is generated out of Dynamics CRM, and a business case report is created from the Dynamics CRM opportunity, and together form the necessary input needed for the pricing committee to approve the order. In addition, because Experlogix is web-based, the sales staff can work with their customer on-site and can create a quote with the assurance that they are connected to the current price list.

“Wherever our sales people are in the field, they are able to access the Experlogix Configurator running inside Dynamics CRM. Experlogix is tied directly into the costs in Dynamics GP, so when they are in front of a customer outside of the office, they using the real-time costs straight from Dynamics GP,” according to Sheriff. The Experlogix Configurator has brought benefits to other departments outside of sales within UNICOM as well. “Our engineering department is keenly interested in making sure the sales staff isn’t quoting something that can’t be built,” says Sheriff. “When engineering creates new limits or constraints, we can use Experlogix to input those real-life rules and ensure our sales quotes represent a realistic and buildable product to our



clients. In addition, we found Experlogix to be unique in its ability to handle our professional and technical services elements. It's not a simple calculation, or just a list of parts and cost of materials that we need to quote. Experlogix enables us to incorporate the business rules and formulas associated with the services we provide and at the same time provides consistency in how those services are quoted across all of our sales associates. It also has provided us with a single point of maintenance, since we maintain these rules and costs in Experlogix."

"Experlogix has made it easier to quote," continues Sheriff. "It has given us more confidence in the accuracy and consistency of our quotes; it has expanded our ability to generate accurate quotes from anywhere our sales people are."

Implementation Highlights

"During the implementation process, we asked Experlogix to do some really complicated things, because we have some very intricate quoting requirements," according to Mike Garrels, CRM Administrator\Developer.

"The Experlogix technical support team has been awesome. They have a good understanding of best business practices which has been helpful to us. And we've been able to email or call them anytime, including weekends or at night and they've always had a solution for us. We've been very pleased working with Experlogix."



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Rob Sheriff

Vice President, Sales Operations

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