

I.B.I.S., Inc.

Customer Success Case Study



“Experlogix turned our resource-draining, manual document tasks into efficiently manageable HR and sales processes.”

I.B.I.S., Inc. provides world-class solutions for enterprise resource planning (ERP), customer relationship management (CRM), business intelligence (BI), and application development for distributors, manufacturers and retailers. Their specialties include Microsoft Dynamics AX and CRM solutions focused on supply chain needs.

Challenge

I.B.I.S. relied on manual workflows to handle all their HR and sales document processes. These HR processes included repetitive tasks such as company handbook and annual employee compensation plan reviews. Tracking the distribution of the handbooks and gathering employee signatures were required for compliance reasons, but consumed a lot of time. Manually editing the compensation plan documents every year created problems with consistency across hundreds of individual documents. As the company grew, these tasks became annual headaches.

Product

- Experlogix Document Automation

Benefits

- Improved document consistency
- Accelerated document processes
- Increased efficiency

Tech

- Microsoft Dynamics 365 AX and CRM

I.B.I.S.' sales processes required the creation of non-disclosure agreements (NDAs). Salespeople would typically retrieve a NDA from their own computers, make necessary modifications, and send it to Management for review. Approved documents were printed and sent to prospective customers for signature, and then returned to

I.B.I.S. where they were copied, filed, and a signed copy sent back to the prospect. All this onerous paper-shuffling took time to accomplish and there was no assurance of consistency from one NDA to another. What's more, since the NDA documents had to be signed before any detailed business conversations could begin, a multi-day delay could keep I.B.I.S. from expediently acting on an opportunity.

I.B.I.S. heard of Experlogix when they conducted an evaluation of its offering in the context of their customer's specific needs. I.B.I.S. became convinced that Experlogix was a solution that offered all the necessary functionalities, and more.

Solution

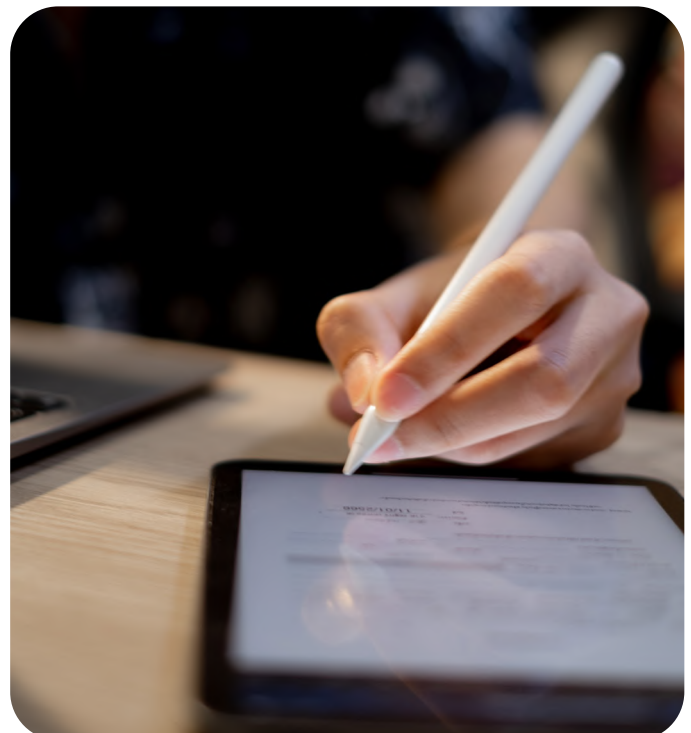
Automating HR and Sales Processes

Working closely with the I.B.I.S. team, Experlogix installed their document management solution and trained I.B.I.S. staff on how to use the software to get the most out of their new automated HR and sales document workflows. Based on Microsoft Word, the Experlogix solution is easy to use – I.B.I.S. business users were able to leverage their Microsoft skill set to quickly design templates with all the required elements.

Experlogix's library of standard templates served as models, making it even easier for I.B.I.S. to create HR and sales document templates that are compliant with the company standards, consistent across the organization and pre-approved by Management.

Experlogix templates and seamless integration with AssureSign for electronic signatures are central to I.B.I.S.' fully automated HR and sales processes, turning the resource-draining and manual tasks of creating, reviewing, distributing, and tracking documents and gathering signatures, into efficiently manageable activities.

Experlogix also centralized the storage of I.B.I.S.' sales documents such as NDAs and statements of work (SOWs). They incorporated a workflow for quick approval, in addition to electronic signature capabilities. Salespeople can get approved, compliant documents into the hands of prospects and capture signatures faster; what used to take several days to complete can now be accomplished in a few hours and with a higher level of quality and consistency.



Tailored Functionalities

As part of their automated HR and sales document workflows, I.B.I.S. wanted to have the ability to push documents to a secure location in Microsoft SharePoint. Though this particular functionality was not included in Experlogix's out-of-the-box solution, the Experlogix team was committed to meeting all customer-specific requirements and quickly delivered the feature that I.B.I.S. needed.

I.B.I.S. also requested a batch-processing functionality to facilitate the creation and distribution of HR documents that needed to be generated in high volumes and in a timely manner, such as the company handbooks. This feature, too, was analyzed, developed and deployed at I.B.I.S. within weeks.

Both functionalities have since been included as part of the standard product capabilities to the benefit all Experlogix customers.

Result

The fully automated internal HR and sales document processes – including easy template design, central storage, batch processing and electronic signatures – boosted efficiencies, allowing I.B.I.S. employees to spend more time on business growth pursuits and less time dealing with internal administrative duties. In addition, their template-based, pre-approved documents ensured compliance with I.B.I.S.' corporate standards, consistency across the company and higher document quality. I.B.I.S. continues to implement Experlogix for applications across their organization.

In partnership with Experlogix, I.B.I.S. has now developed an end-to-end solution that includes Experlogix, Microsoft Dynamics CRM and SharePoint to install at their customer sites. I.B.I.S.' sales pipeline includes several customer projects incorporating this combination of components, representing a new revenue source for the company.



“We needed the ability to grow while continuing to support our customers in the ways that have made our company successful.

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Dwight Specht

Chief Operating Officer

Want to learn more?
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