

MAY 2008

Manufacturing Business Technology

IT FOR MANUFACTURING EXECUTIVES

Empowering excellence in manufacturing

Role-based solutions unleash a
new day at the office

Linking business applications
to collaborative platforms:

- Makes individual workers more productive
- Strengthens value-chain partnerships
- Improves overall business performance

Joint value proposition:

The Experlogix Configurator is a powerful enterprise application that allows manufacturers to create quotes, proposals, orders, and bills-of-material quickly and accurately for even the most complex products. Experlogix has teamed with Microsoft to make this configurator accessible directly through the Microsoft Dynamics CRM software suite. This integration means sales people can initiate a quoting process directly from a customer contact screen. Saved product configurations also can be synched between the CRM system and Microsoft Outlook clients, so sales people can review configurations with customers even if they are not connected to the company's network.



EXPERLOGIX SOLUTIONS

- **Experlogix Configurator:** A powerful enterprise application that enables quick, accurate creation of quotes, proposals, orders, and bills-of-material for complex products. Offers comprehensive functionality for manufacturers, distributors, and service organizations. Superior flexibility and ease of use means installation and user training can be accomplished quickly.

MICROSOFT SOLUTIONS

- **Microsoft Dynamics CRM:** A fully integrated customer relationship management system with functionality for managing customer contact information and sales opportunities as well as customer quotes, orders, and service contracts. The system can drive consistent and measurable improvement in customer service processes.

- **Microsoft Outlook:** Personal productivity tool that manages email, appointments, and tasks for individual workers. Can be integrated with other applications—including third-party business applications—to further enhance role-based productivity.

CASE STUDY

Microscopes made to order

Experlogix, Microsoft speed customer quotes for FEI high-powered microscopes

When you buy a car, you choose from a number of add-on options. iPod dock? Check.

Heated seats? Not necessary.

The same is true for the multi-million dollar microscopes FEI Company manufactures.

Hillsboro, Ore.-based FEI makes electron-optics and focused-ion-beam microscopes that offer precision imaging and three-dimensional characterization to a range of different scientific industries, including nanotechnology and semiconductor fabrication.

Customers across these industries configure microscopes to fit their needs. An instrument used in a biology lab will include particular cameras and pieces of equipment while an instrument used for semiconductor fabrication will include others.

FEI sales representatives haven't always had the easiest time tracking these complex and varied made-to-order specifications when creating sales quotes. But last fall, FEI got help in the form of Microsoft Dynamics CRM. The Microsoft business solution uses Microsoft .NET-connected technologies to automate day-to-day tasks for sales, customer service, field service, call center, and marketing professionals.

To further fine-tune its new CRM system, FEI implemented Experlogix Configurator from Microsoft partner Experlogix.

Experlogix Configurator automates much of the microscope quoting and configuration process. For instance, commonly ordered microscopes are already preconfigured in the system so sales people can automatically gener-

ate quotes and proposals. They also get immediate feedback about whether an individual part is compatible with the overall microscope as planned.

"It basically enforces logic onto quoting and ordering," explains Mark Farley, FEI's worldwide director of IT.

The system offers quick quotes for customers. Sales people no longer quote and configure each instrument by consulting a spreadsheet and a diagram tree to match up parts that can and cannot co-exist on the same instrument. All this information is now accessible through the single Microsoft interface. As a result, FEI Company has reduced quote times for even its most complex instruments. It also is certain that all quotes contain accurate product configurations.

Challenge:

Automate the sales team's ability to configure high-powered microscopes for customers on the fly and in the field.

Why Microsoft and Experlogix?

Microsoft Dynamics CRM manages customer contacts and orders; Experlogix automates rules for salespeople on microscope features that can and cannot co-exist on the same instrument. FEI sales people can now rely on the configuration rules embedded in the CRM /configuration system for quick proposals and quote generation without manually consulting system trees to piece together individual microscope features.

Solutions

- Experlogix assessment and implementation services
- Microsoft Dynamics CRM
- Experlogix Configurator
- Microsoft Outlook

Key benefits

- Generates quick customer quotes for new microscopes
- Ensures microscopes can be manufactured as ordered
- Cuts down on engineering and manufacturing rework for already-placed orders
- Tracks the order from lead to delivery
- Gives sales people access to CRM tools while offline
- Helps manufacturing plan production



The combination of Microsoft CRM and a product configurator from Experlogix gave FEI Company the perfect solution for streamlining the process of taking orders and issuing quotes for its custom microscopes.