

ROAD MACHINERY

Heavy Equipment Dealer Improves Customer Satisfaction,
Optimizes Sales Processes



Company

Road Machinery, LLC
Phoenix, AZ
www.roadmachinery.com

Corporate Details

Road Machinery, LLC, sells and services heavy equipment and accessories for the construction, industrial, and government markets. In addition to its Komatsu and Wirtgen product lines, it also repairs and maintains virtually all major equipment brands at its repair and remanufacturing facilities in Arizona; California; New Mexico; El Paso, TX; and Mexico.

Products

- Microsoft Dynamics CRM

Leading Construction, Mining and Forestry Equipment Dealer Optimizes Sales Processes with Experlogix CPQ.

Challenge

Road Machinery serves thousands of customers across four western states and Mexico in the heavy equipment industry. Company growth put stress on its antiquated quoting process.

“For years, individual salesmen created customer quotes out of a mixed combination of Microsoft Excel, Word, and old quotes,” says David Lewenthal, Corporate IT Director. “They were all different. There was no consistency. And if a salesman was out, there was really no way somebody else could help a customer with a quote they’d received.” The manual process was extremely labor intensive and error prone.

Road Machinery had an early ERP system that was extremely limited in its order configuration capabilities to configure orders. The Company also used Microsoft Dynamics CRM, but they weren’t truly leveraging the Dynamics CRM’s value in terms of managing customer contact, according to Lewenthal.

“Experlogix gives us check lists so that salesmen know what to make available to the customer. Without Experlogix, the odds of missing something were high... today, we do three times the number of quotes in a fraction of the time.”

- David Lewenthal, Corporate IT Director

Solution

In 2012, the Company began looking for a better way to create and track quotes. They reviewed many solutions and “realized immediately that Experlogix was absolutely the right tool for creating quotes,” says Lewenthal.

Road Machinery realized the value of Experlogix’s tight integration to Dynamics CRM, surfacing all product information directly from the product catalog and available to a sales rep in an easy-to-navigate user interface. Reps can quote rentals, new equipment leases and more with a few clicks, enabling more selling efforts and less time spent building proposals.

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Benefits

- Average quote time reduced from 30+ minutes to 5 minutes
- Virtual elimination of quoting errors
- Better margin visibility and control, ensuring optimal profits
- Consistent, professional quote presentation
- 100 percent assurance that customers receive all warranted rebates
- Increased user adoption of Dynamics CRM



“As a result of implementing Experlogix, we began discussing upgrading CRM. There was a lot of internal debate whether to go with a hosted solution, or an in-house version. When we reached out to the Experlogix team, they told us ‘do what’s best for your company. We’ll support you.’”

Result

“It’s hard to quantify all the benefits we’ve received in using Experlogix,” says Lewenthal. “Undoubtedly, we have a great reduction in errors, going from a manual system to an automated system. Experlogix streamlines the whole process. You click on the equipment and all the information is right there,” he explains.

Experlogix also is designed to support process flows to ensure that no critical steps are overlooked. One of the key process steps is including all appropriate rebates that a customer is entitled to receive. Experlogix ensures that the appropriate information is current and always easily available. Another process step in building a quote is calculating the margin to ensure that the quote produces the most profitable return. “Experlogix gives us check lists so that all salesmen know what to review and makes the information available to the customer,” says Lewenthal. “Before, all of that was difficult to keep track of. Without Experlogix, the odds of missing something were high. That ended up costing the customer – and also affected our margins.”

The time it takes to create a quote has fallen dramatically. Before, it was typical for the process to take thirty minutes or longer. Today, it takes five minutes or less. “We do three times the number of quotes in a fraction of the time,” he says.

One of the added benefits of the Experlogix implementation is user adoption of Dynamics CRM within Road Machinery has greatly expanded. According to Lewenthal, sales reps now use Dynamics CRM extensively to track all customer contact. This enables the Company to ensure that it is maximizing every sales opportunity.

“Experlogix is a huge step forward for us,” Lewenthal says. “Eventually, we’ll be enabling our customers to go in and create their own sales quotes. This is something we would have never even considered before. In addition, the sales team is coming to us, wondering what other things are possible with the technology. It’s been a win-win all around.”

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