

# THE RESOURCE GROUP

Leading Microsoft Dynamics Partner Streamlines Software & Service Proposals



## Company

**The Resource Group**

Seattle, WA

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## Corporate Details

The Resource Group (TRG) delivers a full range of software and services that assist businesses with all aspects of Enterprise Resource Planning (ERP), Customer Relationship Management (CRM), and Business Intelligence (BI). Since 1988, TRG has been a premier Microsoft consulting partner serving the Pacific Northwest states of Washington, Oregon, Idaho, and Alaska.

## Benefits

- Consolidated numerous quoting spreadsheets
- Dramatic reduction in quote production time
- Achieved 100% quote accuracy
- Improved field sales visibility & pipelines
- Microsoft Dynamics CRM & Dynamics GP integration



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## The Resource Group (TRG) sells a sophisticated suite of Microsoft Dynamics CRM, ERP and related services to organizations in the Pacific Northwest.

Since 1988, TRG has been a premier Microsoft consulting partner serving states of Washington, Oregon, Idaho, and Alaska.

## Challenge

TRG delivers business solutions which enable their clients to become more productive, increase profits, improve customer service, and increase efficiency. TRG also offers a full range of implementation options, therefore, a typical proposal can have many variables. TRG was using Excel for quoting which was causing problems with speed, accuracy and consistency. "Each quote would take quite a bit of time to build because the salesperson would have to reference other vendor spreadsheets to find the price. It was too easy to make mistakes when using formulas which created inaccuracies in the proposal, and because anyone could manipulate the Excel templates there was no consistency in our presentation to clients. We wanted a consistent look and feel and we wanted to include standard terms & conditions," says Brady Curtis, The Resource Group's Director of Sales and Marketing.

## Solution

As a Microsoft Gold Certified Partner, Inner Circle and President's Club Member, TRG not only sells Dynamics CRM but they use it internally. "We knew that Experlogix was the best configuration tool in the industry so we elected to implement Experlogix internally to increase the speed and accuracy of our quote production processes. We have several hundred SKUs we need to tap into for our large proposals and it used to take us up to an hour to put together a presentable quote — now it takes about 15 minutes with Experlogix," says Curtis. "The accuracy of our quoting has improved as we no longer have formula errors. When using Excel we had numerous calculation errors that we would catch when it was too late. This was affecting our margin and making us even lose money in some instances. It also created customer service issues; having to go back to a customer with a revised quote due to a mistake is unacceptable."

## Result

Experlogix gives The Resource Group the ability to quickly generate a quote for a customer, accurately process additional orders, and assist with workload even during busy times. According to Curtis, TRG now has better visibility on pipeline activities because everything flows through Experlogix and Dynamics CRM.

"One of the key benefits of using Experlogix is that now our sales pipeline is 100 percent accurate. When we generate or update quotes in Experlogix the exact value is recorded in CRM so there is no guess work later by our sales people as it is done real-time," says Curtis. "We also track revision history. Now we always know where we are in the sales process and our opportunity pipeline is much more reliable. We also recently implemented the pop-up notification function within Experlogix. For example, now our sales people have to check if a customer owns SQL Server licensing through us which identifies an existing customer before the sales process progresses too far. This has improved customer service and has proved to be a great time-saver."

Curtis is also impressed with the Experlogix rapid implementation methodology. "From start to finish it took us about one month to get the software implemented and the team trained," says Curtis. "We worked one on one with the Experlogix team so learning how to use the software was easy — I did not even need to open up a manual. If we were to run a ROI calculator for Experlogix, what is the value of losing or forgetting about quotes? Experlogix pays for itself rapidly."