Husky Injection Molding Systems Ltd.

Client Success Story

Global Company Reaps Benefits from Connecting Documents to CRM

Challenge

With more than 40 service and sales offices and customers in over 100 countries, Husky generated about 3,000 quotes a month worldwide, with an average value of about $2 million each. The quotes required delivery in any of 10 different languages and were frequently 70 pages in length. Local laws and customs determined the terms and conditions, product warranties, and technical specifications attached to these quotes. The complexity of Husky's quote documents, the volume generated, and the number of variables that had to be resolved was staggering.

Husky's Sales Effectiveness team used a system based on a combination of tools such as Microsoft Access, Word, Excel, and a number of other applications, where it would manually gather bits and pieces of text and spreadsheets to create customized quote documents. This disconnected approach made it difficult to track exactly how many quotes were being produced and ensure that they projected an image that reflected the high quality of the company's products and services.

CLIENT
Husky Injection
Molding Systems Ltd.

PARTNER
Experlogix

PRODUCTS AND SERVICES
Document Automation for
Microsoft Dynamics 365

Dynamics 365 Finance

BENEFITS

- Improved document consistency
- Increased additional revenue per sale
- Streamlined document processes

COUNTRY
Bolton, ON, Canada

Creating thousands of highly personalized and complex quotes that are consistently formatted, accurate, and delivered in a timely manner sounded almost impossible. That is when Husky decided to connect Experlogix to their Microsoft Dynamics CRM system.

Solution

Streamlining the Quote Generation Process

The first step was to gather input from 200 salespeople and 350 sales support engineers about what components should be included in Husky's quotes, identify variables, and resolve conflicting data. Then, the company used that input to easily create the initial, simple quote templates with Experlogix. Their library now contains over 2,000 sections that the sales team can include in pre-approved templates by simply checking boxes to create highly personalized and accurate quotes in minutes.

The parameters for all of the required variables are controlled with Experlogix in Microsoft Dynamics CRM. Much of the content is automatically generated based on the location of the customers, ensuring that it is rendered in their native language and that the terms and conditions, as well as warranty information, are compliant.

Pricing also comes from a central source — Husky integrated Experlogix's CPQ system to their CRM to supply the technical equipment price configuration, which was merged into the newly created Experlogix quote templates.

CRM Integration Turns Quotes into Selling Documents

Experlogix's document generation logic pulls data from Husky's Microsoft Dynamics CRM system. The Experlogix–generated quotes can include graphics and images found in CRM to highlight distinguishing features in the proposed offerings. The software also controls the inclusion of recommended optional equipment and accessories that might be useful for a particular customer, intelligently merging selected items based on the configuration of the machinery into the quotes.

Going beyond listing additional options, the Husky sales team has also developed value statements to accompany the recommendations. Customers see the benefits of adding those components to their order at a glance.
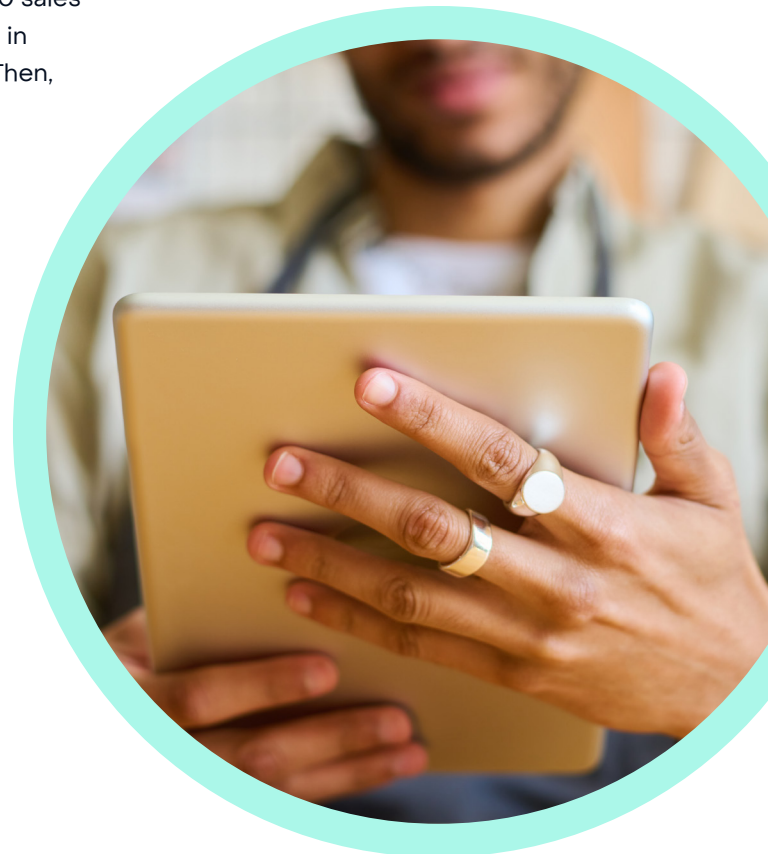
Result

Quoting Husky machines requires a great deal of detail and variability — including outputting documents in 10 languages. Integrating Microsoft Dynamics CRM data and streamlining the quote generation workflows with the Experlogix solution have enabled Husky to not only improve the processes involved in creating, managing and delivering critical business documents but also enhance the effectiveness of these documents. This has resulted in turning Husky's quotes into powerful selling tools; many sales today feature additional revenue generated by the suggested additional options and added-value statements.

The centralized and controlled environment provided by Experlogix and the Dynamics CRM integration has enabled Husky to eliminate the risks of branding, pricing, and compliance issues. Plus, access to CRM data and analytics has allowed the company to analyze statistics such as conversion rates and close ratios, as well as spot trends, identify risks, and make adjustments to help their salespeople succeed.

Want to learn more?
Speak with one of our experts.

Get Started

"We ask our customers to make big investments in our equipment. The documents we deliver to them must be professional, accurate, and consistent."

Sergiy Fomenko
Project Manager at Husky

"One of the biggest benefits of the Experlogix CPQ system is the visibility that it provides to senior management on the entire forecast driven by accurate quoting. They can feel confident that all quote information is precise and universally applied."

Jeff Holway
Vice-President of Sales and Marketing at Experlogix

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