

EPB

Industry Leading Energy & Connectivity Solutions Provider Gains More Time Selling with Experlogix CPQ

EPB Streamlines Complex Quote and Commission Processes with Experlogix CPQ

Challenge

As the greater Chattanooga area's electric utility for more than 75 years, EPB exists to enhance the quality of life in its community by providing energy, communications and related services. While EPB has established itself as one of the premier power distribution and telecommunications companies in the nation, one big challenge they were facing was to effectively incorporate a quoting system that would allow automated workflows and manage sales reps commission structures more efficiently.

"Previously, our quoting consisted of complex spreadsheets that were very difficult to use and could not automate quotes and/or commissions," said Grant Roberson, Business Analyst at EPB. "Because we sell to businesses with multiple locations, the process became very challenging and time-consuming making it nearly impossible for someone to manually do it 100% of the time."



Chattanooga, TN
epb.com

Corporate Details

Established as an independent board of the City of Chattanooga in 1935, EPB is a municipally owned utility that provides electric power, Fi Speed Internet, Fi TV and Fi Phone services in pursuit of its mission, which is to promote economic development and enhance quality of life for its 170,000 plus residential and commercial customers. Today, EPB is one of the largest publicly owned electric power distributors in the country.

Benefits

- Automates workflows, commissions, taxes and revenue
- Manages the rate card through quoting models
- Dynamically assigns products to models helping manage the sales rep selection process
- Automates discount structure by contract and product
- Brings in existing products and data from billing system as a run time query

Products

- Microsoft Dynamics 365 Sales

Solution

"Our decision to go with Experlogix CPQ was an easy one," says Roberson. "We watched a demo in their booth at a Microsoft event and they absolutely nailed it," says Roberson. "We were immediately impressed with the product, discussed it with our boss and were instantly sold. Experlogix CPQ integrates seamlessly with Microsoft Dynamics 365 Sales and works in conjunction with our 'legacy' ERP system."

"During the implementation period, one of the Experlogix system engineers spent a week with us at our headquarters in Chattanooga. Not only was he thorough in the operation and performance phase, but he went above and beyond to give us better ideas on how to create improved workflows and a more efficient sales quoting process."

Result

Experlogix CPQ has given EPB the ability to sell more and spend less time quoting. "Experlogix CPQ allows us to manage the rate card (pricing) through quoting models," says Roberson. "It has enabled us to take the decisions out of the hands of the salespeople and remove any second guessing from the quoting process and creates an environment where the rules of the rate card are integrated into the quoting model through rules, messages and alerts. This ensures us that we are accurately creating quotes that everyone can understand. It also allows us to dynamically assign products to models that help manage our sales reps selection process and create quoting model description workflows in Dynamics."

The sales staff can now use Experlogix CPQ combined with Dynamics 365 to fully support their entire sales quoting process. "Many of our sales reps have been with EPB for 20-plus years and have used many different systems," noted Roberson. "Because Experlogix CPQ integrates so well into Dynamics and Adobe Sign, we have seen a reduction in quoting time from hours to a few minutes. The great thing about Experlogix is its ability to be completely customized. Most businesses give out discounts based on products and/or contract terms. For us, we do both. For our business, some products receive a discount and others do not. It has allowed us to effectively automate discount structures for both contracts and products and dynamically manage the sales rep selections in the process. Experlogix allows you to customize everything from basic to complex," noted Roberson. "Sales reps can now get their orders in more quickly and get back to selling, and personally they can spend more time with their families by not having to stay late at work finishing manual calculations."

"Experlogix delivers the same level of customer service that we like to provide our customers with - which is very hard to do," advocates Roberson. "From a support standpoint, we have nothing but good things to report. The Experlogix CPQ solution is genuinely a great product."

"Our quotes can be extremely difficult and messy. The only way we can do it is with Experlogix. The Experlogix solution has saved us countless of times."

- Grant Roberson

"Experlogix has been able to give our sales reps the gift of time - which is invaluable."

- Grant Roberson

