Instant InfoSystems

Customer Success Story

Technology VAR Cuts Proposal Production Time by 80 Percent

Instant InfoSystems cites a policy of "absolute customer commitment" as the cornerstone of their success.

Their award-winning service model produces strong customer loyalty and support contract renewal rates of more than 90 percent annually.

Challenge

Proposal response time and accuracy were areas that Instant InfoSystems identified to improve for their clients. Previously, sales reps used spreadsheets to calculate the prices and costs of products and services. Once figures were totaled, the rep manually enter the calculated prices into Microsoft CRM. The procedure averaged 30 minutes or more and was open to human error. "The whole process was very manual and susceptible to mistakes" says Dan Nishita, IT Administrator.

Torrance, CA
instantinfo.com

Corporate Details

Instant InfoSystems delivers innovative document delivery and management solutions that enable customers to optimize business processes and comply with industry regulations.

Benefits

- Faster quote-to-orders
- 100% order accuracy
- Streamlines complex price and cost scenarios
- Calculates real-time sales taxes
- Quick turn-around of support renewal quotes
- No longer relies on cumbersome spreadsheets

Solution

"We needed a configurator that populated Microsoft CRM with prices and costs based on predefined rules and formulas," continues Nishita. "Also, it had to enable our sales team to create quotes efficiently and accurately. Of the configurators we considered, only Experlogix could provide the flexibility and functionality we needed, along with deep integration to Microsoft CRM."

Instant InfoSystems took their complicated formulas and a multitude of proposal scenarios, and easily transferred them into Experlogix's Formula and Rule Designer. According to Nishita, "Experlogix accommodated everything we threw at it – including real–time tax calculations from a web–based provider."

Result

Experlogix now enables Instant InfoSystems to extend their responsive service to their sales staff. By increasing quote accuracy to 100% and reducing manual effort, Instant InfoSystems creates their complex product and service proposals in just five minutes – saving more than 25 minutes per quote.

> "Of the vendors we considered, only Experlogix could provide the flexibility and functionality we needed – along with the deep integration to Microsoft Dynamics CRM."
>
> *– Dan Nishita*
> *IT Administrator*

Microsoft

INSTANT INFO SYSTEMS
Information meets expertise.

---

experlogix ········· **Get Started!**

experlogix.com · info@experlogix.com
10808 S River Front Pkwy, Suite 650 · S Jordan, UT 84095
Newtonstraat 2 · 3902 HP Veenendaal, Netherlands