Okuma

Customer Success Story

Charlotte, NC
okuma.com

Corporate Details

Okuma America Corporation is the U.S. based sales and service affiliate of Okuma Corporation, a world-class leader in CNC (computer numeric control) machine tools and technology, founded in 1898 in Nagoya, Japan. Since its founding, the company has expanded globally, with facilities and/or operations in the USA, Germany, Singapore, Taiwan, Thailand, Australia, China, Korea, India and Indonesia. Okuma is the industry's only single-source provider of CNC machines, drives, motors, encoders, spindles and production automation technologies all manufactured by Okuma.

Benefits

- Improved speed and accuracy of quotes
- Configure orders automatically – maintaining data integrity
- Automate bill-of-material and manufacturing orders
- Increased order close rate with a dealer web portal
- Better visibility into inventory
- More self-reliant in changing rules, formulas and adding parts

Products

- Microsoft Dynamics 365 Sales
- Microsoft Dynamics 365 Operations
- Hitachi Solutions Portal

World-Class Manufacturer of CNC Machine Tools Achieves Data Integrity and Improved Quote to Cash Control with Experlogix CPQ

Challenge

"In the Americas region, Okuma CNC products and services are offered almost exclusively through a long-standing distribution and partner network of roughly 2,000 sales, service, application engineering and back office personnel – all of whom are backed by Okuma's service staff and engineering experts based in their Charlotte, NC headquarters.

Prior to implementing Experlogix CPQ, Okuma's infrastructure consisted of 20 plus different business systems, including an older CPQ and ERP solution. "We wanted a system that met our needs and could integrate and play nicely with all of our vendors," said Mike Vassil, Director of Operations at Okuma. "Our previous CPQ system required us to reach out to the vendor to make any changes. It was not possible for us to add rules or make changes to the user interface and nothing was integrated," said Vassil. "It was a 100% manual process that had many steps and was highly error prone. We offer our network of distribution partners an extensive and complex product line with multiple configuration options. In addition, we are a data driven/data centric business and the integrity of that data is paramount," said Vassil. "We needed a solution that could fully automate the process from quote-to-order without impacting data integrity and integrate seamlessly with our distribution network through an online portal."

Microsoft

Solution

"When we evaluated systems," said Vassil, "we could see that Experlogix CPQ had the features and functionalities that we were looking to implement. Solidified by their on–site demo and how well they connected with Dynamics, it was unanimous that the Experlogix CPQ solution was the best option for us – extremely easy to use, intuitive and very relatable to how we configured quotes and orders."

"With Experlogix we are now able to control our own destiny rather than having to rely on other vendors," said Vassil. "Implementation from the Experlogix team was great. We had a dedicated, well–versed resource that worked directly with our team every step of the way. The Experlogix staff was and continues to be very supportive, reliable, knowledgeable and easy to work with."

Result

Experlogix CPQ has given Okuma the ability to completely automate the quote–to–order process while ensuring data integrity and integrating their distribution network through an online portal configurator. "With Experlogix CPQ, we've eliminated errors in the transfer of a configured quote to a production order with the full BOM, routing and associated specifications and we can now leverage data to improve our business and make better business and production decisions. We also have much better visibility into our inventory, so that if a machine is not in stock, it will not be a visible choice," said Vassil. "And, with our improved data integrity, we have better knowledge of what each of our dealer or sales reps are selling (or not selling)."

Ernie Long, Corporate Account Director at Okuma echoed the benefits of how Experlogix CPQ has transformed their business. "With Experlogix CPQ, we are creating quotes within our CRM system that are getting converted into orders faster and with 100% accuracy." said Long. "Previously, to process a complex machine tool order would have taken us a few hours. Now with Experlogix CPQ and its integration to Microsoft D365, we can process that same order in just a few minutes," says Long. "It has also helped out our dealers tremendously," said Long. "Dealers can either use our portal directly or the larger dealers that have a CRM system of choice can launch our portal configurator with Experlogix CPQ from within their own system."

"Overall, we've really enjoyed Experlogix CPQ," says Long. "We've benefited from the product and our users are very happy. We have learned how to advance our product information and the ability to administer the system ourselves is a big help. Having the ability to change the user interface was something we were not able to do in the past. We can now add additional information into the system, adjust how it is presented and have all our systems working and tied together as one. For us, this was a big game changer."

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>
> *– Mike Vassil,*
> *Director of Operations*

> "Building out the actual specs (BOMs and Routings) of a product went from several hours to the push of a button."
>
> *– Ernie Long,*
> *Corporate Account Director*

OKUMA
OPEN POSSIBILITIES

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experlogix

Get Started!

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