How This B2B SaaS Improved Their Sales and Delivery Process

A CASE STUDY
How to Eradicate Disparate Systems, Data Inefficiencies, and Security Vulnerabilities, While Furthering Adoption

Experlogix, a global B2B leader in the Configure, Price, Quote (CPQ) space, specializes in implementing advanced quoting software that helps organizations create pricing estimates quickly and accurately. They have become an industry leader with the mission statement of “empowering top sales teams to configure, price and deliver customized, accurate quotes faster than the competition.”

Experlogix is one of several organizations that were acquired by a large private equity group. Because they were previously separate entities, Experlogix and the other acquired firms had disparate and varying CRM and ERP systems. They needed a way to consolidate all their system’s data to one source of truth for unified sales, customer, and billing processes, and a simple user experience.
The Challenges

Challenge: Disparate Systems

Experlogix’s CRM and ERP system, along with those of the other acquired organizations did not communicate seamlessly, or update in real-time, which limits users’ ability to access current information. The parent organization sought to improve user functionality by allowing users to easily view and edit information from any of the acquired organizations in one location.

Challenge: Inaccurate Data Transfer

To gain real-time insights, Experlogix and the other acquired organizations would need to migrate to a single ERP and one CRM. With their current configuration, their multiple systems were not communicating seamlessly, complicating their sales and financial operations.

Challenge: Data Security

On-premises solutions are more susceptible to security threats as they are not updated as frequently as cloud solutions. On top of moving to a single solution for all of their data, they wanted that solution to live in the cloud for ensured security and automatic updates.

Challenge: Lack of Technical Expertise

To receive maximum benefits from CRM and ERP platforms, there’s a certain level of training and knowledge required. Experlogix wanted their technical team to be up-to-date on processes, functions, and opportunities for their platforms to work well together.
The Results

Result: Consolidation To One Source of Truth to Resolve Two Challenges
By consolidating to a unified system with Dynamics 365 CRM, Dynamics 365 Sales, and Dynamics 365 Business Central, Experlogix users gained near-instant visibility into their data. Information flowed seamlessly between the two systems, simplifying the tasks of multiple project teams around the world. Sales, customer, and billing workflows improved with fewer errors, leading to quicker closings on deals, orders being filled accurately, and invoicing clients efficiently.

Result: Reduced Data Risk
Since Microsoft offers automatic updates to their cloud and online solutions, Experlogix had the assurance their data was secure with their Dynamics 365 systems living online. User permissions and credentials were created in Azure Active Directory to designate which users could perform certain functions. Security increased as both systems were password protected, and only accessible within their secure domain. Their data is now more secure than ever before.

Result: Resource Confidence
The technical resources on the Experlogix project team received training from JourneyTEAM to become solution and integration experts. By adopting new processes to drive efficiency with their new online CRM and ERP solutions, Experlogix team members have a process to onboard new users and tackle roadblocks. These benefits continue to grow long term with reduced support costs and high user satisfaction.

Business Outcomes

- Improved User Experience and Adoption
- Consistently Updated and Accessible Data
- Higher Security with Fewer Errors
How efficient are your organization’s solutions?

Find out if it’s time for a change with a Dynamics 365 Sales Health Check or Business Central Health Check.

JourneyTEAM is dedicated to helping customers achieve a competitive advantage by identifying the best solutions and services that accommodate your business needs. JourneyTEAM provides consultation, training, and implementation in the United States, developing and deploying connected business technology solutions that help leading global companies across several industries, including Finance, Manufacturing, Media & Communications, and Healthcare, get to market faster and achieve continued success.

121 W Election Rd. #300
Draper, Utah 84020
833-438-2312
info@journeyteam.com
journeyteam.com

“Through our relentless pursuit of excellence, we simplify and effectively use technology to create a positive, lasting impact on the world.”

—JourneyTEAM Vision Statement