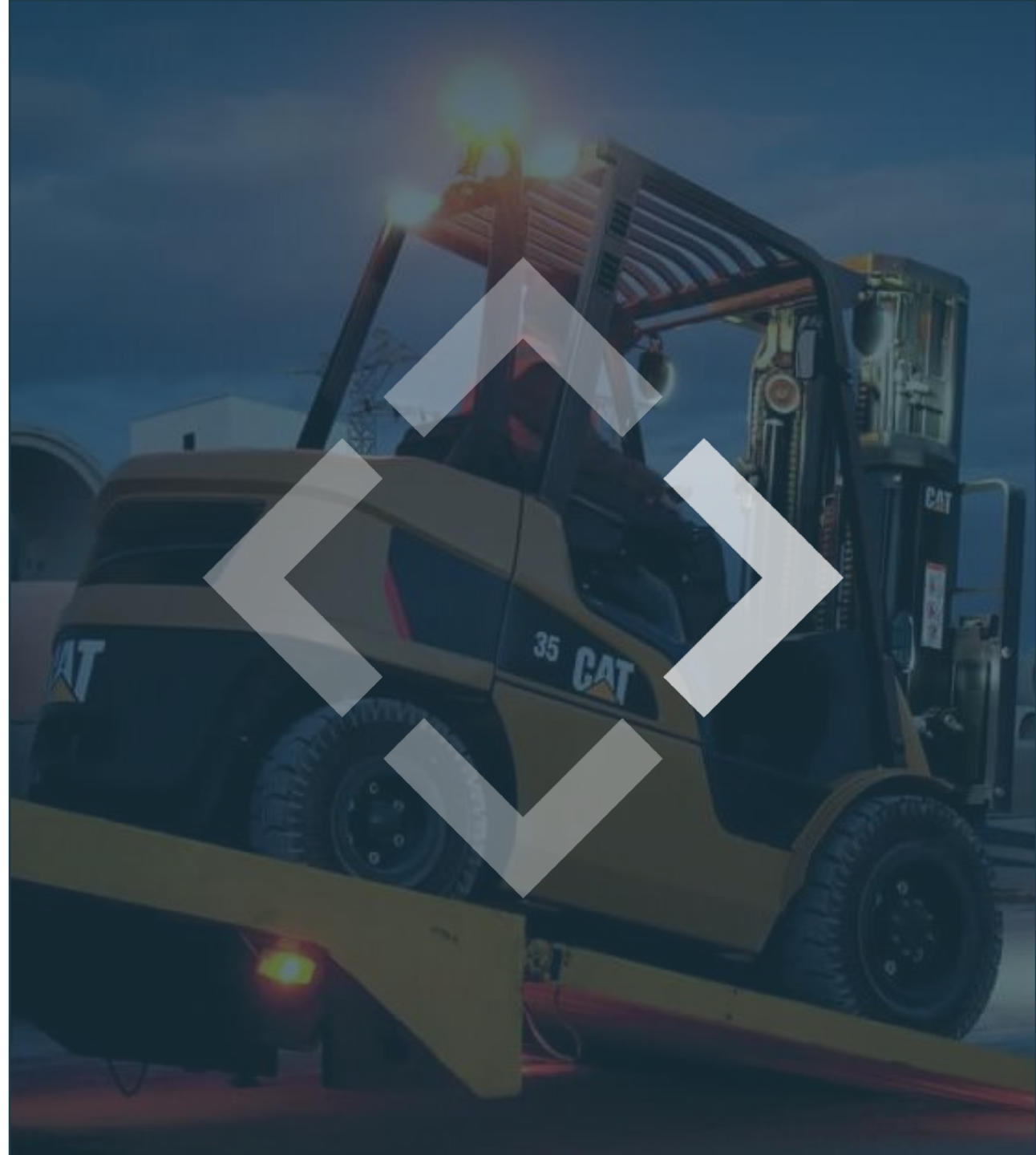


PRAGMATIQ

COMPANY CASE STUDY

IMPACT HANDLING



COMPANY BACKGROUND

Impact Handling is one of the leading providers of material handling equipment in the UK. Supplying forklift trucks, warehouse equipment, heavy application trucks and a vast range of other specialist equipment. The company has grown vastly since it was established in 1985 and they now have 13 depots strategically spread across the country and operate with sales teams in three separate locations.



CHALLENGES

- › Needed to upgrade their current system due to impractical functionality, affecting user experience
- › Reporting was a challenge due to data being stored on lots of different spreadsheets and thus prevented management from having a clear overview of sales data
- › Previous quoting and order processes were inefficient – multiple documents required to be generated manually for every order, which was time-consuming and left room for human error



SOLUTION

- › Designed, developed and implemented a bespoke quoting solution
- › Implemented a document generation tool
- › Implemented Power BI to give managers greater visibility into quotes, sales orders, forecasts and lost orders
- › Delivered User Training sessions to ensure users fully understood how to use the CRM, the benefits of this and how it can improve their day-to-day processes



BENEFITS

- › Efficient and controlled quoting; the new quoting tool will save around 75% manual administration time spent on processing orders
- › Single truth of the customer
- › Improved management visibility
- › Connected departments
- › Move away from manual pricelists

CHALLENGES



Impact Handling was using a system to mainly track leads and mature them into opportunities ready for the sales team. Due to impractical functionality within the system, engagement was affected, and users found themselves working outside of the CRM and often using spreadsheets. This led to data being stored in different places, meaning tracking customer engagement, pipeline and sales were extremely labour intensive. Reporting was also a challenge due to data being stored on various spreadsheets and thus prevented management from having a clear overview of sales data.

Another inefficient but essential process which will be the focus for this Case Study, was the quoting process and generation of supporting quote and order related documentation such as proposals, order acknowledgements and rental agreements. For every order, multiple documents were required to be produced; a time-consuming task which due to being done manually also left room for human error. This process was one of the main challenges to be addressed within our solution, alongside the following:

- > **Increase operational efficiency**
- > **Enhance employee productivity**
- > **Improve management visibility**



SOLUTION



After gathering detailed requirements, Pragmatiq designed, developed and implemented a bespoke quoting solution. This replaced the manual workload, enabled their sales teams to mature opportunities, generate sales quotes efficiently, accurately and in a professional manner. The solution enabled the sales consultants to build forklift trucks across multiple franchises and models with the desired configuration and sales options. Based on the configuration and purchase options, complex finance calculations were computed.

In addition to this, we implemented a document generation tool which auto-populates data, directly from the records in Dynamics 365 into the required documentation (this functionality is available within Dynamics; however, it has limitations and was judged that a document generation tool was the correct approach).

Alongside this, we implemented Power BI and created a management dashboard giving visibility into quotes, sales orders, forecasts and lost orders. As a result, managers would gain increased insight into data, allowing them to make more informed strategic decisions. From a training perspective, the business can see where business units and depots are under-performing and over-performing and provide better additional training and support in those areas.

Towards the end of this Phase 1 project, a series of User Training sessions were then undertaken to ensure users fully understood how to use the CRM, the benefits of this and how it can improve their day-to-day processes.



“We worked with Pragmatiq who successfully implemented a quoting tool for sales. They were generous with their time, taking every opportunity to understand our needs both now and in the future. Their deep analysis was invaluable, helping us to refine our working practices and automate our processes to maximise productivity and ultimately save time and money. Thanks to Pragmatiq, we now have a bespoke system that has been tailored to our specific needs and is fully integrated with Microsoft Dynamics.”

ANGELA DE KLERK - BUSINESS DEVELOPMENT / HEAD OF MARKETING AT IMPACT HANDLING

BENEFITS



Through the implementation of our proposed solution, the following benefits were realised:

- > **Efficient and controlled quoting** – The sales teams are now able to generate quotes quickly and accurately, saving time and increasing operational efficiency. This new quoting tool will save around 75% manual administration time spent on processing orders. To provide more context, that will reduce the manual administration concerning order processing and document generation from around 8 to 2 hours per month, per sales consultant.
- > **Single truth of the customer** – All client information is now held in a single Dynamics 365 platform, that is accessible to all the users within the organisation. This has improved the efficiency, increased engagement between departments and will enable some manual steps in the process to be automated.
- > **Improved management visibility** – We implemented Microsoft Power BI meaning data was consolidated in one central application. This allowed Impact Handling to make insightful decisions, identify trends & performance in all sales activities and help management gain a 360-degree view across the entire organisation.
- > **Connected departments** – Internal communication has improved as Impact Handling now have the ability to move information between departments, without requiring normal communication like phone calls, e-mails, etc, resulting in increased efficiency. Alongside this, users are also following aligned processes and working within one system, enhancing the collaboration and cohesiveness across the business.
- > **Move away from Manual Pricelists** – Operating with manual pricelists increases the chances for human error and is a challenge to control across sales teams. By moving away from manual pricelists, this has provided extra control and allows sales management to ensure that the pricing in the system is accurate, up-to-date and accessible by all sales consultants across all business units.



“Our team spent the time to really get under the skin of the Impact Handling business and the complexities around their sales process. We believe this was crucial for delivering a fit for purpose solution which is undoubtedly transformative from a process, employee empowerment and management perspective.”

JAMIE EVANS – TECHNICAL DIRECTOR AT PRAGMATIQ

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