

Manufacturer of Specialized Medical Devices Slashes Quote Time by 88%



L-R: Wendy Swanson, Application Support Analyst; Susan Bohr, IT Director; and Sara Inghamstraw, Director of Sales Operations and Customer Service



Helmer Scientific designs, integrates, manufactures, markets and distributes specialized medical and laboratory equipment to clinical and life science customers. The company maintains an inside sales staff to directly assist clients in the U.S. and Canadian market, and contracts with 25 distributorships outside the nation to handle the needs of clients located in more than 125 countries.

The Challenge

Their manufacturing line is set up for highly configurable product assembly options, which makes each order unique. Generating quotes has always been a complex task as their clients often alter their initial product configurations, sometimes multiple times, or have a special request for a non-standard product-build. Prior to selecting Cincom, Helmer used an order-build platform that was supported by two separate out-of-the-box software packages—one for product configuration and another for price quote generation.

According to Susan Bohr, "Our former solution was very manual. The faster our business grew, the more we required a systematic approach to capturing order information that did not rely on tribal knowledge."

"Previously it took anywhere from 30 to 90 minutes to create a quote. Now we can do it in less than five! We definitely recommend Cincom to others."

- Sara Inghamstraw, Director of Sales Operations and Customer Service

Customer

- Helmer Scientific

Industry

- Designs and manufactures specialized medical devices and laboratory equipment

Size

- Internal sales team handles 17,000 clients
- 25 international distributors, serving more than 125 countries
- Clients include physicians, clinicians, hospitals, medical research and life science companies

Location

- Noblesville, IN

Solution Goals

- Improve accuracy of quotes
- Simplify the order-build process
- Accommodate specials handling
- Streamline back-end maintenance
- Allow for system expansion

Integrations

- Sales
- Customer Service

Applications

- Microsoft Dynamics® CRM
- Fourth Shift ERP

Solution Selected

- Cincom CPQ™

The Search and the Solution

When Sara Inghamstraw, Director of Sales Operations and Customer Service, attended a Microsoft® convention to evaluate Microsoft Dynamics CRM, she also came away with an appreciation for Cincom's highly configurable CPQ. Over the next few months, Helmer evaluated several vendors, including Cincom. Bohr says, "Cincom was very willing to show us how they could help address our particular business goals. Other vendors didn't seem to have that same interest level." The company decided to go with Microsoft Dynamics CRM and Cincom CPQ.



Undercounter Laboratory/Pharmacy Refrigerator

Implementation and Integration

The project included integrating Cincom CPQ with Helmer's new CRM system, along with its existing ERP tool, Fourth Shift. According to Inghamstraw, "Cincom was a valuable partner to us during the process. Every time we presented them with an unexpected challenge or unique need, they were able to deliver a solution."

"Cincom trained us to use the software as the project progressed, which helped us to become more and more self-sufficient."

– Wendy Swanson, Application Support Analyst

Bringing IT Together

Having a CPQ solution in place has eliminated the need for IT to maintain separate systems. Additionally, Helmer's IT staff can use Cincom CPQ's visual display to guide users to complementary options that were previously easy to overlook.

"Cincom makes it easy to see what options are available and what options are being discounted. This represents a new level of analytical insight, which can be used to put together targeted sales and marketing campaigns."

– Sara Inghamstraw

"Cincom has been a good partner for us. We are pleased with both the product and the business relationship."

– Susan Bohr

Operational Improvements

Just a short time after adoption, Helmer has already reported operational improvements that have had an impact on their business. For instance:

- The time it takes for a sales rep to generate a quote has been significantly reduced.

According to Bohr, "Previously, even with our most experienced reps, it took 30 to 40 minutes to create a quote. That process could take as long as an hour and a half with new sales reps. Our veterans can now create quotes in less than five minutes. This has already delivered a huge return on investment, enabling us to justify the IT infrastructure updates."

- The company no longer anticipates needing to hire and train additional sales reps, at least for the immediate future.
- Improved accuracy and transparency during the order-build process has significantly reduced the number of orders needing to be manually re-worked.

Working with Cincom

According to Susan Bohr, "Cincom has always worked through any changes we wanted by asking a fundamental question: 'Can the system make that [desired change] natively without customization work?'"

"They are very knowledgeable not only about their own products, but also about other products that are part of the integration. It has been refreshing to have solution support where the vendor takes the time to solve the problem and not just use the opportunity to upsell us an additional product or service."

Sara Inghamstraw concurs. "We have received all of the support that was needed throughout this entire project. Cincom wanted our IT infrastructure upgrade to be as successful as we did. We definitely recommend Cincom to others."



World Headquarters • Cincinnati, OH USA • US 1-800-224-6266 • info@cincom.com • cincom.com/contact-us

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