



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

## Manufacturer of Specialized Medical Devices Slashes Quote Time by 88%



*Undercounter  
Laboratory/  
Pharmacy  
Refrigerator*

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 markets, and contracts with 25 distributorships outside the nation to handle the needs of clients located in more than 125 countries.

### 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 Configure-Price-Quote technology



## 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 Helmer's IT Director, "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."

## 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. Inghamstraw said, "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's Configure-Price-Quote solution.

## Implementation and Integration

The project included integrating Cincom's Configure-Price-Quote solution 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."

*"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."*

— Sara Inghamstraw

## 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 the Configure-Price-Quote solution's visual display to guide users to complementary options that were previously easy to overlook.

## 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 sales reps to generate a quote has been significantly reduced.

According to Helmer's IT Director, "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

Helmer's contracts department is located in Pittsburgh and according to their IT Director, "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."

