

General Equipment & Supplies Reduces Quote Times From an Average of Two Days – To Two Hours

Fargo, N.D.-based heavy equipment dealer General Equipment & Supplies (GES) creates several thousand quotes each year worth over \$250 million in revenue. A fragmented process of phone calls, emails and shared spreadsheets made it difficult to manage quote requests, workflow, and status updates. New Dynamic created a quoting system within Dynamics 365 Sales that added immediate structure and speed to the quoting process, enabling GES to take quoting from as long as three days and more, to as little as 30 minutes or less.

Expensive machines, with multiple options, and complex configurations make capital equipment sales challenging to say the least.

Accurately calculating prices, margins, and availability is half the battle. The other half is keeping it all organized and accessible for departments and decision-makers at heavy equipment

dealers like General Equipment & Supplies (GES), a Komatsu dealership based in Fargo, North Dakota.

Matt Kern is vice president of rolling stock sales at GES. Kern and his team of 30 sales and product support representatives create more than 3,000 quotes each year, representing over \$250 million in potential new business.

“We’re focused on smart growth, especially over the next 5 years, that allows us to scale with our existing employees, and the quoting automation developed by New Dynamic is supporting that. Productivity is up, sales are growing year over year, and we’re doing it with the same number of people which is exactly what we want.”



In business for nearly 40 years and constantly expanding, GES has clearly been successful but GES leaders had become increasingly weary of what Kern calls the “swivel-chair” process – the practice of employees searching emails, files, and the ERP system for details and information to complete a quote.

Kern and his colleagues brought in New Dynamic to map the quoting process and create a centralized quoting function using Microsoft Dynamics 365 Sales.

“Our quotes are complicated and have always required a series of phone calls and emails in the past, for everything from pricing options to credit checks, to delivery logistics, but it took too long and had too many manual requirements,” Kern said. “New

– Matt Kern, Vice President Rolling Stock



Dynamic came in with a process mapping and automation plan using Dynamics 365 Sales that matched our needs and took our average quote times from two days to two hours, and it's been a gamechanger for us."

Faster Quotes Lead to Faster Deals

With 10 U.S. offices spread across the upper Midwest and two in Canada, GES quotes can sometimes involve dozens of individuals and as many as 20 information requests from sales, finance, operations, and transportation.

"Getting all quoting activities into one view across our offices and departments has improved collaboration and given us the competitive advantage of speed," Kern said. "We're always competing with the biggest names in the industry and having one source of information for quoting allows us to respond more quickly, and close deals more quickly."

New Dynamic began with interviews and business process mapping. The information requirements for equipment costing, pricing, transportation, and delivery were captured for Dynamics 365 Sales customizations.

"New Dynamic has done a thorough job documenting how our quotes get created and then applying that learning to the solution," Kern said. "In the time we've been working together, they've learned the heavy equipment industry, they know the right questions to ask as we continue to improve the system, and they've even given us guidance on how to handle change and drive adoption among our teams."

Pains & Gains

Pains

- Quote information requests, spreadsheets, and numerous emails were time-consuming to open, manage, and answer.
- It was difficult for key employees and departments to collaborate and track quotes-in-progress.
- Quoting data such as value, volume and equipment type was not readily accessible in one view.

Gains

- New Dynamic designed quoting automation to serve as the central repository for all quotes and information requests necessary to create the quotes.
- Executives and department leaders have a real-time view of quoting activity, progress, and status updates.
- Average times to prepare a quote have gone from two days to 2 hours.

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Kern said the quoting automation is well on its way to paying for itself and has already provided dividends in numerous ways. Real-time quoting data on equipment types, pricing and closed-won rates give GES more direction on price points, equipment options, and terms that are working. Monthly and even ad hoc reporting requests are also easier to run and available on-demand in Dynamics 365 dashboards and pre-configured reporting tools.

But time savings and structure have provided the biggest returns.

"Extra emails and phone calls have gone way down across the whole company," Kern said. "And if we can save 10 or 20 people from having to open, read, and answer or delete the same email, we've just saved hours of wasted time each day that can now be spent on new sales, better service, and more responsive support."

Kern said near terms returns on the project have been very positive, and it's all part of a 10-year growth strategy the company began in 2017.

"We're focused on smart growth, especially over the next 5 years, that allows us to scale with our existing employees," Kern said. "And the quoting automation developed by New Dynamic is supporting that. Productivity is up, sales are growing year over year, and we're doing it with the same number of people which is exactly what we want." ●

New Dynamic, LLC
913.402.4599
NewDynamicllc.com

