



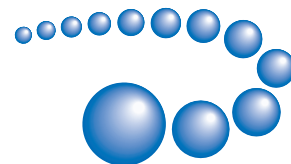
*The beginning of the Depression in 1933 may not have seemed like an auspicious time to start a new business. Nevertheless, that was when Bill Meyer, a mechanical engineer working for a Midwestern air pump manufacturer, decided to strike out on his own. Meyer founded the General Blower Company, making centrifugal fans for industrial ventilation, pneumatic conveying, dust collection, and gas boosting in Chicago, Illinois.*

*Today the company, now known as Wm. W. Meyer & Sons, Inc., is a world leader in the manufacture of dry bulk material processing equipment, pneumatic conveyors, dust collectors, insulation blowing machines, and vacuum collection systems. Meyer & Sons now has over 100 employees, and in February 2007 moved into an 80,000 sq. ft. state-of-the-art manufacturing facility in Libertyville, Illinois.*

### **Summary:**

Meyer & Sons sell their products through multiple sales channels that include a combination of internal sales, manufacturers' reps, and their own direct sales force. As the company and product lines have grown, this led to challenges in the quotation process. Over time, the sales people began to create their own quotes, and each one had their own style. The lack of a standard approach resulted in incomplete quotes with important information missing.

With the introduction of *Concept™* from *Configure One™*, Meyer & Sons have achieved their objectives of bringing accuracy and consistency to their quotation process and have eliminated the need to check every quote. *Concept* has streamlined the process of converting a quote into a sales order and reduced the time needed to produce a quote by 75 percent.



# Configure One

## Multiple Sales Channels

Meyer & Sons sells their products through multiple sales channels that include a combination of inside sales, manufacturers' reps, and their own direct sales force. As the company and product lines have grown, this has led to challenges in the quotation process. Ray Galuska, vice president of sales and marketing, explained:



Ray Galuska,  
VP, Sales & Marketing

“We use manufacturers’ reps to sell our industrial products, while our own inside sales group handles our commercial products. We have a sales engineering group that works with our manufacturers’ reps and customers. We also have a few direct sales people. In the past, the problem was that we weren’t

always getting copies of the quotes from the manufacturers’ reps. When we did receive copies, the information was sketchy, and the majority of the time it was three to four weeks old. This made it virtually impossible to do any sales forecasting. The other problem was that there wasn’t any one single method of producing the quotes.”



Kathy Avdis,  
Marketing Manager

According to Kathy Avdis, marketing manager, the situation was further complicated when the inside sales force and the manufacturers’ reps began generating their own quotes through a variety of standalone systems:

“Originally, all of our quotes were typed by

a secretary, so they were consistent and all looked the same. The quotes were based on a work sheet with all the available options. The sales person would first check what was required for that product, and then a secretary would type the quote.

“But over time, as our sales people became more computer literate, they began to type their own quotes and each one had their own style. Even though the information was the same, the quotations all looked different.”

This lack of a consistent process had additional implications for sales tracking and forecasting, as Avdis explained:

“When the secretary typed the quotes, she would file copies so we had a record. But when the sales people produced their own quotes, the procedures were not strictly followed. Sometimes when they were busy, they forgot to send a copy to the sales department. The other problem was with the manufacturers’ reps. Even though they were obliged to send us copies of their quotes, that didn’t always happen.

“Many times we would get a sales order without seeing the original quote. Or we would receive a purchase order referencing a quote number, and sometimes there was a copy attached and other times not.”

## Important Information Missing

The lack of a standard approach resulted in incomplete quotes with important information missing.

“Many of the quotes we received from the manufacturers’ reps were not satisfactory, as they had some critical information missing,” said Avdis. “Because our products are configured for each customer based on certain features, we have to apply rules regarding temperature, size, the material of construction—all these factors play an important role. That was a problem. Although the reps knew what they were quoting, they didn’t always pay close attention to the rules, exclusions, and price lists.”

Meyer & Sons wanted to ensure the prices quoted were accurate, and eliminate the need to manually check each quotation. Avdis explained:

“Before implementing Configure One’s *Concept*, when we received a quote from the field, someone internally had to review it. Each manufacturers’ rep is assigned to an inside sales person, who would double-check their work. They would check the pricing and ensure that the options selected were correct for the application. But depending on their workload, sometimes the checking didn’t happen. When you have that situation, some things are going to be missed or overlooked, and there is more chance of errors.”

## Selecting the Right Solution

After working with a custom-written program for some time, Meyer & Sons decided to look at commercially available configuration solutions.

“We initially heard of Configure One through a referral,” said Avdis. “We looked at their web site and liked what we saw. We contacted Configure One, explained our problems, and they demonstrated *Concept*. We evaluated products from three other vendors, but decided that *Concept* was the best fit.”

“*Concept* is a web-based program, it’s available 24/7, and our sales team can access it from anywhere.”

To meet the diverse needs of their sales channel, a web-based solution proved to be the most attractive.

“As most of our sales force is mobile, we needed a solution that they could access it from the road,” said Ray Galuska. “Because *Concept* is a web-based program, it’s available 24/7, and our sales team can access it from anywhere.”

## Defining the Rules

Any configuration system is only as good as the rules. Interpreting the dependencies and inter-relationships is key when defining the rules.

“The first step was to develop a proof of concept,” said Kathy Avdis. “We gave Configure One the data on one of our popular products, and explained what we wanted to accomplish. They created a prototype that contained all of our prices, rules, and exclusions. We selected one of our complex products, with the most options. This was a good starting point because we could then modify it, and apply the same logic to our other products. As a final check, our inside sales people used *Concept* for a couple of months before we released it to the field.”

“The Configure One consultants were very professional and very easy to work with.”



## Successful Implementation

Meyer & Sons commenced their implementation in April 2006, and right from the start, Configure One’s consultants played an important part.

“The Configure One consultants were very professional and very easy to work with,” said Avdis. “They were always helpful and answered all of our questions.”

Meyer & Sons has between 70-80 users across 22 offices. Some use *Concept* regularly, others just occasionally. As of January 2007, all of Meyer & Sons reps use *Concept*.

“Since our reps are spread out geographically, we conducted ‘webinar’ training and walked them through the process,” said Galuska. “Some of the reps were unsure at first, but we followed up with one-on-one training where necessary. All of our sales people now use *Concept*. They can meet with a customer and while they are talking they can produce a quote, send a letter, and create a print of the proposed configuration. It is easy and fast. Some of our manufacturers’ reps said they wished that their other partners had a program like *Concept*.”



## Benefits

Ensuring that all the critical data is entered into the system is essential to produce an accurate quote and avoid problems later. Avdis explained:

“One of the problems we had in the past was getting application information, and that’s very critical to defining the correct product. We manufacture a component that goes into a production line. The more information we have regarding how our product is going to be used, the better we can determine the appropriate product. Sometimes if the product was returned, when we checked through the quote, we found the application information was not provided.

“Today, the first thing the user has to do when they use *Concept* is enter that application data. Then they proceed to select various options and prices. They also have the ability to enter a discount. The subsequent quotation, automatically generated by *Concept*, is uniform regardless of who entered the data. Other outputs from *Concept* may include sales drawings, sales material, terms and conditions, and warranty information. This package can be sent via email or printed out and faxed to the customer.”

“One of the things we love about *Concept* is that once the rules are established, it is error proof.”

## Consistent, Accurate Quotations

One of the major benefits of *Concept* is that once the knowledge is captured in the rules, then it’s impossible to make a mistake.

“One of the things we love about *Concept* is that once the rules are established, it is error proof,” said Avdis. “For example, if the user selects a stainless steel unit, only the permitted options are displayed. If they select a certain temperature, then the subsequent options are limited. There are fail-safes; they can’t make a wrong choice.”

Today, *Concept* gives Meyer & Sons more and better information to help with its sales forecasting.

“Now we have visibility of all of the potential orders,” said Galuska. “We can run forecasting reports from *Concept* by rep, sales person, customer, or product. We have more information about opportunities, and we can also conduct win/loss analysis from standard reports in *Concept*. We want to use this information to help our reps and sales people with their forecasting.”

*Concept* has also streamlined the process of converting a quote into a sales order.

“Once the quote is in *Concept*, the data is available in a format ready to enter into our ERP system as a sales order,” said Avdis. “This has reduced the amount of time needed to add an order. Before *Concept*, we would have to go through a process of checking prices and verifying options, and then write up the quote again in the correct format to enter into our ERP system. In the future, we plan to integrate *Concept* with Syteline™, our ERP system, so that we can eliminate the re-keying of data from one system to another.”

“*Concept* has enabled us to reduce the time needed to produce a quote by 75 percent.”

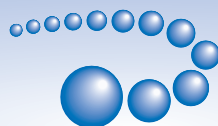
Meyer & Sons have achieved their objectives of bringing accuracy and consistency to their quotation process with *Concept*.

“Our use of *Concept* is growing and we have produced around 3500 quotes during the past six months,” said Galuska. “*Concept* has enabled us to reduce the time needed to produce a quote by 75 percent. There is no question that the accuracy has improved, as everyone is using the same standard program and database.”

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