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CASE STUDY



IMPROVING CUSTOMER ORDERING AND ITS IMPACT ON OPERATIONAL PLANNING FOR LEADING MANUFACTURER BY INTEGRATING CONFIGURE PRICE QUOTE (CPQ) FUNCTIONALITY TO THEIR EXISTING ERP SOLUTION.

A laminate case-goods manufacturer embarked on implementing a solution to enable users to configure finished goods items within the Estimate or Customer Order forms, facilitating the creation of Estimate or Job Order Bills of Materials (BOMs) directly from the configuration tools.

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THE CHALLENGE:

Disjointed Processes in Estimation and Bill of Materials Management

A national laminate case-goods manufacturer offering quick ship, high value solutions compared to traditional solid wood office furniture had manual processes for quotes and planning that lead to operational inefficiencies. Their current workflow involved estimates being generated on spreadsheets, necessitating manual re-entry into the current system, and the separate construction of BOMs for the shop floor. This disjointed process not only consumed valuable time but also introduced a significant risk of errors and discrepancies. Reliance on spreadsheets for estimates can lead to version control issues and difficulties in tracking changes accurately. Manual re-entry into the ERP system not only duplicates effort but also increases the likelihood of data entry errors, potentially leading to inaccurate financial records and inventory management. Separately, building BOMs for the shop floor creates inefficiencies in production planning and execution, as it requires redundant data input and increases the likelihood of inconsistencies between planning and execution phases. This fragmented approach impedes operational efficiency, increases the potential for errors, and hampers the organization's ability to respond swiftly to market demands.



THE SOLUTION:

Implementing Infor's Configure Price Quote for Integrated Workflow Efficiency

To address the challenges a comprehensive solution was needed. Copley Consulting Group, a division of Judge Consulting Group, devised a plan to address the operational challenges by recommending the implementation of Infor's Configure Price Quote (CPQ) solution. Through a detailed evaluation of the current processes, Copley determined that the client needed an integrated solution that will seamlessly connect the estimation process with the production planning and execution processes. This recommended solution eliminated the need for manual re-entry of data, reducing the risk of errors and discrepancies. Furthermore, automation tools within the CPQ system will be used to generate Bills of Materials (BOM) automatically based on the estimates created, resolving the issue of separate construction of BOMs for the shop floor. The solution also established a centralized data repository to store all pertinent information, such as estimates, BOMs, and production data, offering a single source of truth for all departments engaged in the manufacturing process.



THE RESULT:

A Fully-Integrated Solution Providing Streamlined Operations

Following the guidance and collaboration with Copley, the implementation of the Infor Configure Price Quote (CPQ) solution yielded significant improvements. The new functionality reduced the risk of errors through manual re-entry of data, automate creation of a single BOM, and created one single source of truth with a centralized data repository.

This comprehensive solution streamlined workflow, resulting in enhanced efficiency, accuracy, and consistency across all departments involved in the manufacturing process. This consolidation allowed teams to easily access and utilize accurate information throughout the quoting process, enhancing efficiency and accuracy. The implementation of standardized templates and procedures ensured consistency and precision during quoting, both within the organization and for customers. Clear guidelines and quality control measures were put in place to guarantee that quotes adhere to predefined criteria and accurately reflect pricing and product information.

Regular training sessions and ongoing monitoring have reinforced best practices and maintain a high level of accuracy. To improve transparency and facilitate collaboration, the integrated system delivers real-time tracking and monitoring of the quoting process, allowing stakeholders to stay informed of progress and deliver timely feedback. By adopting these measures, the organization has streamlined operations, improved data accuracy, and delivers consistent and reliable quotes that meet both internal and external expectations.

In addition to the successful go-live of both their CloudSuite Industrial (CSI) and CPQ solutions, the client is replicating the footprint at an additional location, further enhancing operational efficiency and market competitiveness.



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