

SUCCESS STORY



Manufacturing industry | Online portal based on Microsoft Dynamics 365 | Utz Group



Utz Group digitizes and simplifies quotation processing with customers

Using an online portal, based on the CRM cloud solution Microsoft Dynamics 365, the Utz Group will be able to create offers for its customers digitally, largely automated and efficiently. Via the portal, customers can quickly and easily receive a price quotation for requested products and request a binding offer at the push of a button. Utz sales department adds the missing data to the CRM and automatically generates a PDF offer that can be retrieved from the portal. Utz, a manufacturer of storage and transport containers as well as plastic pallets and workpiece carriers, has commissioned ORBIS Schweiz AG to develop and introduce the portal solution.



Online portal based on Microsoft Dynamics 365

Despite the digitalization in automated intra- and extralogistics, plastic containers, open fronted storage bins, trays and pallets are indispensable components for order in the warehouse and for an optimum flow of material. This applies to the automotive, chemical, pharmaceutical and electronics industries as well as to the food, textile and wholesale sectors.

Utz Group

Headquarters: Bremgarten (Switzerland)

Sector: Manufacturing industry

Production facilities: 8 Production facilities on 3 continents

Employees: 1'150 employees worldwide

www.utzgroup.de

Digital offer processing in online portal

In many cases, the quality products of the Utz Group, one of the leading manufacturers of innovative containers, pallets and workpiece carriers made of recyclable plastic for transport, storage and intralogistics, are used for this purpose. The Utz Group, headquartered in Bremgarten, Switzerland, has eight production sites on three continents and operates worldwide from six sales companies and more than 30 agencies. In 2018, it generated sales of CHF 300 million with around 1,150 employees.

In order for the company to stay on course for success in the future, efficient business processes in all areas are of great importance in addition to constant product innovations, ultra-modern production and excellently trained specialists. The Utz Group is now a big step closer to this goal with an online platform, based on the portal functions of the CRM cloud solution Microsoft Dynamics 365 in the processing of quotations for customer projects.

Consistent flow of information created

„With this portal, we are laying the foundation for a digital, uniform and efficient quotation processing. It runs without media discontinuity from the customer inquiry to the binding offer. Thanks to the continuous flow of information, the process is simplified and accelerated on the part of the customer and on the part of our sales department. This saves time and money,“ says Sieglinde Bürgi, ERP/MES Core Manager at Georg Utz Holding AG.

With the customer portal, which is optimized for all common Internet browsers and designed in its own corporate design, the Utz Group brings the offer process directly to the desktop PC, notebook, smartphone or tablet of the customer's responsible employees. This allows you to process quotation requests efficiently at any time. Thanks to the use of responsive design technology, the portal interface automatically adapts to the respective device or operating system. A role concept ensures that each user only has access to the information that is relevant to their tasks.

Dashboard provides a clear view of projects

When a customer logs on to the online portal, a dashboard with information on current and completed projects (= opportunities) with Utz appears as the entry page. At the same time, contract data - conditions, price lists, discount tables - stored for this customer in the portal, are loaded in the background.



The customer's business user can select projects according to various criteria (My/all/finished/updated). In the case of projects that are still in the planning stage, the user will also be shown the estimated chances of success - 20, 50 or more than 70 percent. Depending on how a project develops, the values can be edited and adjusted.

If the probability of an opportunity, such as the delivery of a storage system including Utz containers, exceeds the 20 percent mark, the customer must create a new project in the portal and enter the relevant information: the type and number of containers and accessories, for

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example: 5,000 HDPE stackable containers with barcodes, plus project name, delivery location and date, and chances of success. The currency as well as delivery conditions and possible license fees are already preset.

Request offers simply by mouse click

Based on this data and the stored prices and discounts, the portal automatically determines a target price excluding transport costs for the project. If the customer wishes to receive a binding offer, all he has to do is click on the „Request“-Button and Utz will immediately inform the distributor of the request by e-mail.

The distributor then creates an offer in Microsoft Dynamics 365 that is based on the target price and includes the transport costs that are entered manually. At the push of a button, the user in Utz Sales Department finally converts the offer into a PDF document using the add-on „Documents Core Pack“ (DCP) and places it in the portal for approval.

If necessary, the customer can change his request at any time and obtain a separate offer for each change. In order to maintain an overview and ensure transparency, all changes are saved in the portal and can be retrieved as a history.

The slim and modern interface of the portal meets the wishes of the end user for simple and convenient operation by visualizing all information clearly. This, combined with the option of managing user data via self-service, is another major advantage of this solution. This enables customers to create or deactivate new users or change user data at any time.

Introduction „in time and budget“

The Utz Group commissioned ORBIS Switzerland with the development and implementation of the customer portal. ORBIS Switzerland convinced with its high competence in Microsoft Dynamics 365 Online and intelligent solutions for the portal. Thanks to the partnership and target-oriented cooperation between the internal project team and the ORBIS experts, the portal solution was introduced in just under four months and put into operation in January 2019, on schedule and within budget.

The Utz customer Swisslog, a leading provider of automation solutions for health, storage and distribution centres, has played a major role in this success. He has worked on the construction of the portal from the beginning and has been using it actively since the go-live.

„Our approximately 60 specialist users in the 17 global companies benefit greatly from the integrated IT support, which replaces time-consuming manual and less transparent quotation processing in Microsoft Excel,“, explains Vasco Weisskopf, Strategic Purchasing Manager at Swisslog AG.

Optimize and extend portal solution

But this is only the beginning. In the foreseeable future, the Utz Group intends to integrate additional customers into the portal in order to simplify and improve cooperation in the processing of quotations. With the support of ORBIS, the web application is continuously optimized and expanded, for example with notification functions that indicate whether a follow-up action is necessary. For example, when an offer expires and needs to be updated. The use of Microsoft Dynamics 365 Customer Engagement in sales is also planned.



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More information



<https://www.orbis.de/en/microsoft-by-orbis/>

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