

Project Snapshot

About the Customer

Avery Dennison (Avery) is a global leader in labeling and packaging materials and solutions. The company's applications and technologies are an integral part of products used in every major market and industry.

With operations in more than 50 countries and 25,000 employees worldwide, Avery Dennison serves customers with insights and innovations that help make brands more inspiring and the world more intelligent.

Avery Dennison Corporation (NYSE: AVY) is a Fortune 500® company with sales of \$6.3 billion from continuing operations in 2014 and are based in Glendale, California.

"We finally have control over pricing for our sales quoting... We have reduced our sales quote turnaround time from weeks to days..."

Senthil Kumar Ragupathi
Sr. Business Analyst
Avery Dennison

Challenge

The **Performance Tapes division of Avery** was in need of implementing a system to standardize, track and aid in the quotation and pricing process that would reduce administrative and pricing errors while giving better accessibility to the commercial organization to get more timely, accurate and reliable pricing information.

Avery determined that a new **Sales Quote Management and Workflow** solution should be a web-based system, allowing for full visibility of the sales quote, company-wide, throughout the process, with easy but controlled approvals via email and web links to the web system.

Avery had some specific requirements that needed to be met, such as:

- Creation of QAD pricelists upon quote activation
- Intelligent product selection based on attributes
- Customizable quote templates
- Streamlined order entry using quote information
- Custom UOM calculations
- Ability to interface with Salesforce.com

Key Elements of Consideration:

Standardization—a framework to ensure that all disclosed information is relevant, reliable, comparable and consistent.

- A well-defined and systematized work flow for pricing approval process
- Reliable pricing information to the commercial teams

- Use of templates for all quotes
- Standard definitions and processes

Governance & Support processes—governance and support provide a decision making framework that is logical, robust and repeatable. In this way, an organization will have a structured approach to conducting its business.

- To provide 24/7 availability to enter quotes/pricing into the system
- Create user guides covering standard process & metrics

Improve user functionalities—designed to operate at peak efficiency allowing the user to operate beyond standard ERP performance

- Visibility of all active quote / pricing for the customer
- Automatic conversion of quotes to price lists in MFG/PRO
- Eliminate/ reduce touch points from quotes to pricelist creation

Solution

After a thorough review of existing Sales Quote Management and Workflow solutions from other suppliers, Avery selected ISS Group as their vendor. A key differentiator in the ISS Group solution that was a critical requirement to Avery was the ability to provide off-the-shelf real-time integration to their QAD ERP system...ISS Group is the only vendor to offer a solution, iQuote™, which provides the features and functionality required, along with seamless integration to their QAD ERP application.

iQuote™ utilizes the ISS Group AART™ technology for routing of Customer sales quotes, and creates QAD Sales Orders and/or Customer Price Lists upon quote acceptance by Customer. iQuote™ provides the functionality to create sales quotes for new Prospects or existing Customers, creating a sales quote for new or existing Items, multi-line sales quotes and volume discounting, creating a new sales quote from quote history, and more.

Benefits

- **Improved pricing control:** CSRs and Sales Reps now have visibility to margins. Based on the discount requested by the customer, approvals would be required.
- **Reduced quote to order cycle time:** Not all quotes need to be approved by management. If a quote is within the originator's discount authority then the Quote is approved. If it's not, then it will route electronically through the organization. Approvers rapidly respond to an approval when using the automated iQuote system than they were when someone placed a piece of paper on their desk.
- **Less data in QAD by only creating price lists for accepted quotes:** Originally all quotes were being loaded into QAD as Customer Price Lists. This caused 'tens of thousands' of price list records which may or may not have been used. It was a lot of clutter! Now, the Price List records are only created if and when the customer places their first order for this quote.
- **Streamlined QAD Order Entry:** Customization was made to QAD to show the CSR and approved and outstanding quotes for the item being ordered. This saves a lot of time by creating the price list records for the quote as they're needed.
- **Process Standardization:** There is now a single process to control all quotes being generated. Prior to iQuote automation different quote templates were being used throughout the organization. We now have uniformity and process throughout the company for our customers. Internally CSR and Sales representatives have a clear definition on quote guidelines.
- **Improved quote visibility:** Customers sometimes ask for items quoted multiple times. iQuote™ will warn/notify the originator of existing quotes for the same items as they are being quoted.

