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CUSTOMER SUCCESS STORY

How Wright Implement Settles Deals Faster

THE SITUATION: WORKFLOW LIMITATIONS

Wright Implement wanted a simpler and faster process to move purchase orders (PO) to settlement. Its system, dubbed "workflow," required manual, complicated updates and long processes, and it often delayed returns to inventory.

The system's limitations ultimately caused Wright to look for another solution. That search led them to Anvil App Works.



*Dealer: Wright Implement - Owensboro, Kentucky
User: Joe Smith, Operations Manager
Anvil User Since: 2019*

PAIN POINTS: SYNCING & REPORTING

Wright had a list of specific issues to fix. To start, quotes were being managed by salespeople and were tied to individual stock units. This created process gaps and required workarounds.

Other issues included:

- **The workflow system did not automatically sync** with John Deere systems. This led to issues with inventory management and incorrect or outdated information on deals at settlement.
- **The workflow system only facilitated deals** and did not have a separate function for service requests or internal documentation.
- **Inefficient time gaps in updating trade details** led to incomplete inventory status and delays in inspections and service.
- **Limited reporting** and incomplete information on deals for sales incentives.

THE SOLUTION: ORDER TO CASH

Wright needed a solution that integrated with its dealer management systems and was customized to fit its internal processes.

After switching its business platform to Anvil Enterprise, Wright replaced its workflow with Anvil's Order to Cash (O2C) feature. O2C not only fixed its workflow issues, it expanded its capabilities by integrating the data from the CRM with O2C.

"When we looked at Anvil, we could see that by integrating the CRM package with the O2C, we could do more," says Joe Smith, Operations Manager at Wright Implement.

"Using O2C, we begin managing entire quotes starting when the quote is marked sold," he says. "Anvil automatically takes the quote, marks the individual stock units sold and ties them to the new PO and the customer. We have so much more information about the deal now because we manage the deal by quote."

50%

Reduction in errors

30%

**Reduction in time
to process**

5

**Manual processes that
were automated**

Problem: Collecting and Tracking Trade Details

Solution: Create Stock Units for Trade Equipment

Built-in automations in O2C collect information on trade units when a quote is created. Stock units can be assigned to trade units when the PO is created. Using automation, inspection requests are triggered when the unit arrives on the lot.

"Some of these deals go a long time," says Smith. "Combine heads may not be scheduled to show up until August on paper, but may be delivered in January. If we have them, we'd like to do an inspection and complete any needed repairs immediately, versus waiting until August. Then they are ready for sale right away and we can even pre-sell them."

Problem: Complicated Manual Updates

Solution: Automated Processes

Managing deals through workflow was a manual and labor-intensive process. Errors and delays on returning equipment to inventory were common.

O2C has built-in automations that trigger requests and actions as the deal progresses. Make an update in one system, and it will automatically sync with O2C to ensure the deal is accurate.

Problem: Limited Visibility

Solution: Visual Stage Tracking

Management at Wright needed a way to report on the status of deals and salespeople activity in the workflow pipeline. However, its system was limited in its reporting capabilities.

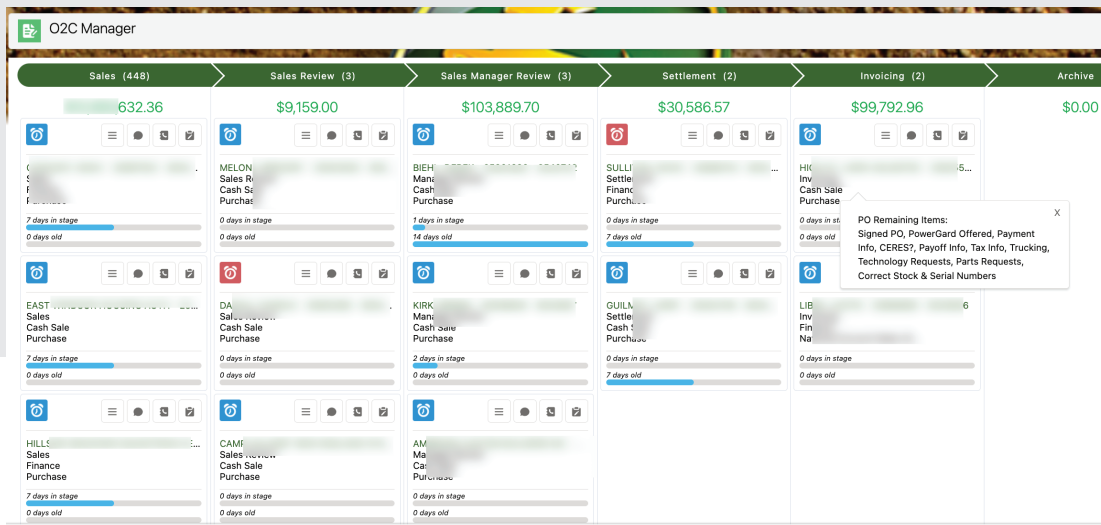
O2C gives management instant updates on the order pipeline. Using a visual Kanban board, it is easy to see where each deal is in the PO process. As deals progress through the O2C system, managers can track deal progress and expected revenue by stage, salesperson, store or region, and more.

Problem: Managing Service Requests

Solution: Work Queues

Wright needed a way to create and manage service requests that were not related to active deals.

O2C gave Wright flexibility to generate requests and assign them to the appropriate work queue. Wright now maintains one system across the dealership to log all service requests. Salesmen can easily submit requests for deals in progress or follow up on requests to service inventory on the sales lot.



“For the first time, we can see where everything stands. You can see when progress stalls and why.”

—Joe Smith



ORDER TO CASH

Anvil's O2C feature takes a complicated process and makes it simple.



The "Mark Sold" automation marks all stock units as "sold" and moves the invoice into the Order-to-Cash system.



Complete Sales Checklist items and attach any necessary files. Notify other departments of any work requests.



Advance the deal through each stage of the process with simple drag-and-drop navigation.



The deal arrives in the settlement department with all work completed, a complete paper trail, and no missing information to search for.

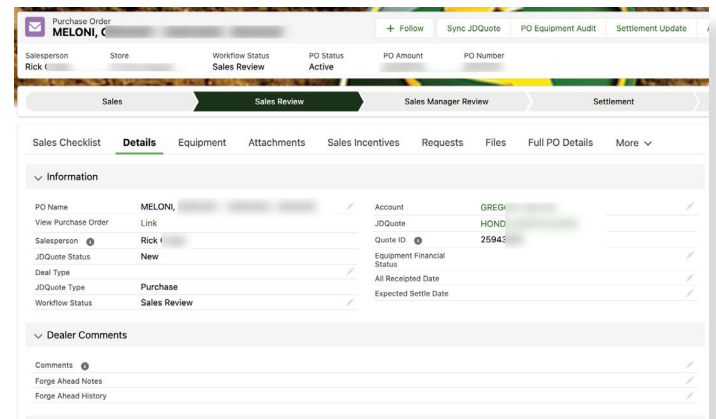


WHAT CAN ANVIL DO FOR YOU?

Improve your ability to forecast, detect potential issues early and resolve situations faster with increased visibility into each stage of the deal.

"Anvil gives us an integrated solution for our order-to-cash workflow with the flexibility we need in generating work requests and managing all the parts of a deal together as a unit," Smith says.

Anvil brings every detail in your O2C process together and keeps deals progressing toward completion!



Learn more. Book a free demo.

sales@anvilappworks.com

763-273-4926 | www.anvilappworks.com