



WESTMOR iQ CPQ CASE STUDY



Westmor Industries, based in Morris, Minnesota, is North America's largest fueling equipment and services provider. Founded in 1972, Westmor offers a full line of petroleum and liquid handling parts and equipment. Since 2007, annual sales have tripled and its workforce has more than doubled. From refiner terminals to bulk deliveries and at each point in between, Westmor offers a variety of solutions from a single source. To aid in Westmor's quoting processes and capabilities, it worked with Luxent to implement iQ, a CPQ (Configure, Price, Quote) application built for manufacturers natively on the Salesforce platform that seamlessly quotes from within the Salesforce platform.

CHALLENGES

- Required a flexible system that could support its remarkable growth
- Needed a more sophisticated and agile quoting system that went beyond what its home-grown systems could offer
- Desired a quoting solution that would work seamlessly in Salesforce and a configurator that could handle more than 900 product combinations
- Wanted to work with a solution provider that would be a true partner: responsive to requests and flexible when things needed to change

FAST FACTS

Westmor

Oil and Energy

Headquarters: Morris, MN

Employees: 201-500

Type: Privately Held

www.westmor-ind.com

***"IN LUXENT WE HAVE A PARTNER THAT IS RESPONSIVE, COLLABORATIVE,
AND COMMITTED TO OUR SUCCESS." – BETH KOEHL***

SOLUTION

- Luxent's iQ CPQ application on the Salesforce platform which seamlessly integrates with Salesforce to provide faster, easier, more collaborative quoting through a simple, easy-to-use interface

RESULTS

The addition of iQ complemented Westmor's previous Salesforce investment and allowed Westmor to:

- Quote directly within the Salesforce platform
- Create consistent, professional-looking quotes quickly and easily
- Leverage a configurator capable of handling complex quoting requirements
- Produce three different PDF quotes, with the flexibility to produce more PDF quotes in the future as business grows
- Customize the application to support Westmor's fulfillment process by creating shop floor build-out instructions from the final customer-approved quote

"The sales team loves the simplicity of iQ and how easy it is to quote compared to the old way."

FOLLOW UP

Since the initial iQ CPQ implementation, Westmor has continued its fast-paced growth, both through new customer and business acquisitions. To scale with its growth, Westmor/Superior Industries has grown its use of Salesforce, including through iQ and Salesforce Communities. "We take a very pragmatic approach to assessing and implementing solutions that meet business and user needs while supporting the ongoing growth of the company," said Beth Koehl. "Both Salesforce and iQ CPQ are highly scalable solutions that will continue to support our needs as we bring on new employees, customers, and partners."

"We take our partnerships very seriously. Every partner must align with our four core values and be someone that we can trust, respect, and collaborate with long-term. Luxent has been a partner that demonstrates they care about our business, our users, and our success. That means a lot to us."
– Beth Koehl, Technology Project Manager

For its next phase of iQ CPQ deployments, the Westmor team is largely handling the implementation itself. "iQ is a sophisticated product that meets all our complex configuration needs, yet its design is straightforward enough to allow us to implement in-house," said Koehl. "With the Luxent development team's support, we've been able to take the ownership for our second phase of installation which gives us a greater appreciation for the product as well as knowledgeability with our users."

The team doesn't just implement and move on, however. "We regularly reassess our systems and partners to ensure they're working how we need," Koehl continued. "With regard to iQ and Luxent, we've found that the product and partnership have continued to improve over time. In Luxent we have a partner that is responsive, collaborative, and committed to our success and in iQ we've found a product that continues to meet and exceed our needs."

