

Fulfilling big ambitions



Client

TLV Euro Engineering UK Limited (TLV UK) distributes specialist products used in steam heating and cooling systems. It is owned by TLV Engineering Group, which is based in Japan.

Goals

- ◆ Improve the efficiency of the sales process
- ◆ Manage customer orders and stock more effectively
- ◆ Target higher volume business

Charteris' Role

- ◆ Support the implementation of Microsoft Dynamics AX
- ◆ Establish and embed new integrated systems and processes

Results

- ◆ Time savings of over 40% in the creation and management of quotations and sales orders
- ◆ Clear visibility of stock movements and accessible management information
- ◆ The ability to pursue and win high volume business

TLV UK wanted to supply higher volume orders, but its small-company systems and inefficient processes were holding it back. With support from Charteris, it implemented Microsoft's Dynamics AX solution and established integrated business processes and systems. Now, this small business is entering profitable new markets and fulfilling its larger ambitions.

TLV UK is a small sized company that thinks big. Based in Gloucestershire, it distributes steam traps, pressure reducing and control valves, flow meters and other specialist equipment used in steam systems. Traditionally, the company's customers include schools, colleges, hospitals, laundries and paper manufacturing plants in the UK. However, TLV UK wanted to expand its business by starting to supply larger customers, including international oil refineries and other large chemical plants.

"We made a conscious decision to target the expansion of our customer base to include higher volume business," explains Michael Povey, General Manager of TLV UK. "But because of this new strategy, we needed to change the way that we conducted several of our core business processes."

At the time, the company produced its quotes using Microsoft Word and then manually calculated the total and checked the account details using its SAGE accounts package. Finally, it recorded and managed its quotes in a Microsoft Access database. When a

customer placed an order, the quote had to be re-entered into SAGE to create the customer's sales order and a copy of this document would be faxed to the distribution centre in Germany. There was no formal sales order from TLV UK to the distribution centre, which made it difficult for the company to monitor the movement of stock.

"As we were looking to win business with larger customers for larger numbers of products, we knew that this process could not support our growth aspirations," says Povey. "There were three different systems on the go, just to produce one quote, and as there was a lot of manual input, there were more chances of human errors. Our stock control systems also created more problems than they solved."

TLV UK decided to implement a single, integrated system and selected Microsoft's Dynamics AX after a thorough review and evaluation process. To support the implementation project, the company also appointed a team of experienced consultants from SIG, now part of Charteris.





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Michael Povey,
General Manager,
TLV Euro Engineering UK Limited



Product and business knowledge

The consultants worked alongside Povey to implement Dynamics AX to precisely meet the business requirements. The entire solution, including full functionality for quotations, sales order management, stock control and customer relationship management was completed in less than six months, in time for the company's year end.

“The skills of the individual consultants involved in our project were very good,” says Povey. “They were very knowledgeable both about the product and about the needs of our business. When we asked if they could change the appearance of the various screen, they immediately recognised the benefits for users and made it happen.”

Since Dynamics AX went live, TLV UK has noticed a dramatic improvement in employee productivity. “Before we moved to AX, we had a record month when everyone in the company worked flat out to process a high volume of orders. Last month, we nearly equalled this record, but processing orders absorbed less than 60% of our employees' time. With the remaining 40% of our time, we could proactively follow up on quotes and call prospects. AX has made us a lot more efficient.”

Dynamics AX has also given TLV UK much greater visibility of its stock movements and clearer management information. Povey explains: “Shortly before we switched to AX, our fabrication sub-contractor managed to produce an entire pump unit from the 20 or more components that had been over-supplied and were just sitting on their shelves. We knew what we had sent to fabrication, but we didn't know what hadn't been used. Now, we have a much clearer view of all our stock, at all times.”

Boundaries pushed back

Microsoft Dynamics AX was an unusual choice for a company with less than 20 employees, but TLV has ambitious plans for growth. “There is a perception that Dynamics is for large companies,” says Povey. “But it offers the same advantages for small companies too. This solution gives us the full functionality we need to handle our complex business processes. It will also be very scalable to meet our needs in the future.”

Using Dynamics AX, TLV UK is able to more effectively target larger customers and win high volume business. “We are now quoting for and taking on projects that we previously would have declined, because they were too large or complex for us,” admits Povey. “It would have been virtually impossible for us to effectively manage these projects before. Now we can push back these boundaries and handle multi-million pound contracts without worrying about the physical and financial controls.”

Dynamics AX also gives TLV UK more flexibility to meet the precise requirements of new customers. “Some of our large customers want to make staged payments,” explains Povey. “Our new systems have functions for this and can handle the requirements of our large customers comfortably.”

TLV UK is on track for a record year and plans to expand its systems in line with its ambitions. Future projects include a remote access connection for regional salespeople, an Electronic Document Interchange (EDI) link with the German distribution centre and an e-commerce website. Povey concludes: “The consultants are very good at what they do. I tend to go with their recommendations, because I strongly believe that they understand our business and know what they are doing.”

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Business specialists who speak IT
IT experts who think business



About Charteris

Charteris delivers greater customer focus and business efficiency through seamless business and IT consulting. Our unique blend of 'business specialists who speak IT and IT experts who think business' ensures that clients receive seamless solutions that deliver competitive edge.

Leading public and private sector organisations draw on our deep experience to help them improve performance and reduce costs. Our services include [Customer Centric Business Change](#), [Microsoft Dynamics](#) solutions and other advanced solutions based on the full spectrum of [Microsoft Technologies](#) and associated technologies.

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