



# Yale Door

Yale has been able to increase order accuracy, speed up the delivery process and provide an even better service to customers with XaitCPQ.

## Who is Yale?

Yale is one of the most recognisable and trusted brands in the world. It has been leading the way in home security since 1843 and protects millions of homeowners in over 125 countries. The company's mission is to keep people safe. Yale Door is the UK's leading supplier of composite doors, all of which have a 10 year guarantee, lifetime support and access to a dedicated installation and support team.

## Project Objectives

Yale Door wanted to enhance its ecommerce website with a fast, engaging and interactive product configurator. In addition to providing an improved customer experience, it had to allow new products and rule changes to be quickly and easily introduced without requiring help from an external supplier. Importantly, the company wanted to streamline workflow processes by using the configurator both on its website for end-user customers and within its ERP system for installers and employees.

**“It is so easy to use and gives us greater control over the way that customers can interact with our ecommerce website as well as how we collaborate with our installers.”**

Lee Conlin, IT Team Manager, Yale Door

## Key Requirements

### Improve the customer experience

Yale wanted to ensure that the product configurator loaded without delay and was extremely responsive. It would present high quality graphics to allow customers to quickly see



With a track record of successful deployments, XaitCPQ's experienced project team gave us high levels of confidence that the installed system would integrate effectively with our legacy systems and meet all our business expectations.

Lee Conlin, IT Team Manager, Yale Door



[yalehome.co.uk](http://yalehome.co.uk)



**"XaitCPQ® is far more than just a product configurator as it reaches into every area of our business, bridging information and functionality gaps by seamlessly integrating with our ERP system and web application. It extends both the functionality and ROI of our legacy systems, allowing us to consolidate our leading position in the market."**

Brian Onions,  
Managing Director  
Yale Door



[yalehome.co.uk](http://yalehome.co.uk)

their chosen selection and guide them smoothly through the ordering process to improve sales conversion.

#### **Simplified system management**

A key objective was to empower in-house staff to quickly add new products and options to the website as well as updating configuration rules and pricing without having to make change requests to an external supplier. Easy access to configurator from existing systems

Faster quoting ensures that more quotes are produced by your sales team. Employing a rules-based structure means that more people can create accurate quotes – no matter how complex. Reliance on key personnel is removed, and any quote revisions required are delivered to clients fast.

#### **Streamline workflow processes**

Yale wanted to enhance and streamline workflow processes throughout the organisation to ensure that customer orders were shipped in a timely fashion and improve communications with customers and installers throughout the fulfilment process.

### **Evaluation and Deployment**

#### **Evaluation process**

After evaluating possible solutions, including a tool within Microsoft AX, XaitCPQ® was selected as it allowed all configurations and rules to be centrally stored and managed with full website integration. XaitCPQ® also seamlessly integrates with Microsoft AX where information on part numbers, pricing and customer orders is maintained for access by employees and installers.

#### **Project Management Expertise**

With a proven track record of deploying similar solutions, Yale had the highest levels of confidence in XaitCPQ®'s ability to handle the complexity of the task and deliver a cost effective solution that would allow the configuration of the millions of permutations that were required.

#### **Fast Deployment**

XaitCPQ® showed Yale how to use the configurator alongside its existing systems. The project team demonstrated the ease with which the configurator would integrate with Microsoft AX and the website to ensure a seamless flow of information. This integration was fully documented and the system was extensively tested to ensure that it would perform efficiently at all times.



**Easy to use**

XaitCPQ® provided a single day training session which was all that was required to allow Yale staff to fully understand how to configure and manage the system before capturing rules and options and uploading them into the XaitCPQ® database.

**Benefits**

**Bring new products to market faster**

XaitCPQ® has streamlined the change management process and allowed Yale staff to quickly introduce changes to pricing, specifications, products and colours without having to refer such requests to the web designer. It allows Yale to focus on front end KPIs such as conversion rates, and enables the company to react faster to changing customer demand

**More professional documentation**

XaitCPQ® enhances the presentation of all documentation provided to customers requesting quotations or placing orders. High quality graphics depict their specific door configurations with all added accessories. The same information is provided to installers to ensure that every order meets customer expectations

**Improved Sales Conversion**

As soon as the system went 'live', it was clear that visitors to the website were engaging positively with the product configurator. This has increased both sales and revenues

**Improved communications with installers and employees**

Using the same configuration rules within Microsoft AX business applications and the website, XaitCPQ® has allowed workflow processes to be optimised. It also provides installers and employees with instant access to all relevant sales and customer information.

**Comprehensive reporting**

As well as providing real-time feedback showing orders placed and products or features of interest, XaitCPQ® enables a comprehensive range of management reports that enable faster and more informed decision-making

**Streamlined workflow processes**

XaitCPQ® provides a centralised data repository where information about configuration, pricing and graphic rules about every door and accessory is stored and maintained. The system currently supports over one billion permutations to satisfy the most demanding requests.

**Automation increases accuracy**

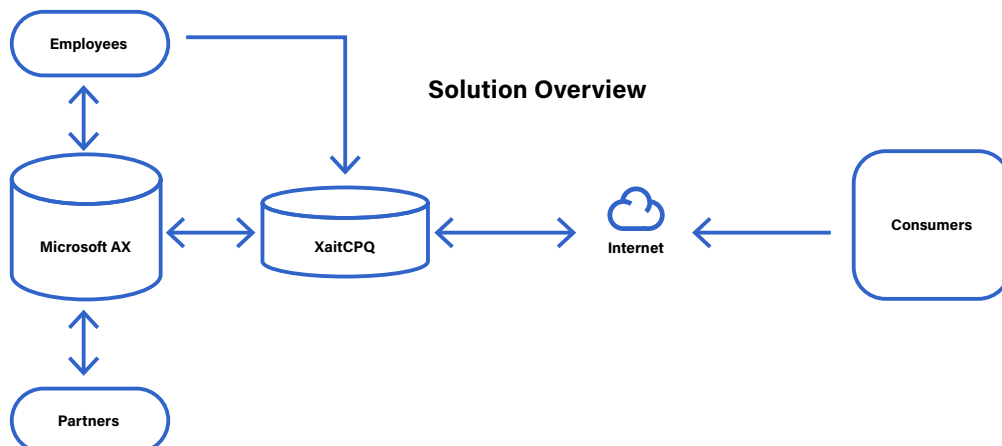
XaitCPQ® seamlessly integrates with Yale's website and Microsoft AX business applications to automate the order generation and fulfilment processes. By eliminating manual workflow processes, Yale has been able to increase order accuracy, speed up the delivery process and provide an even better service to customers.

**Simple architecture**

XaitCPQ® offers a simple, scalable architecture that provides the most cost effective and flexible solution over the longer term. It fully integrates with the Microsoft AX and website applications to extend the functionality and deliver an improved ROI.

**Future-proofed for planned growth**

The system will enable Yale Door to easily add new eCom-merce websites as the product range expands and leverage its investment in back office systems. The company estimates that XaitCPQ® will help to reduce the time taken to introduce the new sites from twelve to three months.





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Xait helps organizations with complex pricing options maximize revenue and drive cost and risk from their sales process.



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