



Epicor Success Story

Process Technology, Inc.

Electrical distributor uses Epicor Professional Services and LMS to become an industry leader

Company Facts

- ▶ Location: Murray, Utah
- ▶ Industry: Electrical
- ▶ Number of Employees: 13
- ▶ Web site: www.process-tech.com



Success Highlights

Challenges

- ▶ Help a small Utah distributor become a "name" in its industry through improved inventory turns and customer service

Solution

- ▶ Epicor Prophet 21 and Learning Management System

Benefits

- ▶ Increased annual revenues from \$5 million to \$9 million over six years, while adding only two employees
- ▶ Customer service levels improved, increasing competitiveness and valuation

Process Technology, Inc. (PTI), an electrical distributor serving Utah, eastern Nevada, southern Idaho, Colorado, and southwest Wyoming since 1986, has established itself as an industry leader in process instrumentation and automation control.

PTI initially went live with Epicor Prophet 21 enterprise resource planning (ERP) software in 2007, focusing first on the system's manufacturer rep capabilities to track commissions for orders placed directly with the manufacturers—as opposed to PTI—as their agent.

Learning to make the system work the way you do

According to Michelle Bennion, Systems Manager, Process Technology, Inc. has increased its use of Prophet 21 over time, with support from Epicor Professional Services and the Learning Management System (LMS). "Prophet 21 is just the vehicle," she states. "The team behind it, and the resources like LMS and the training courses, are what allow us to use it best." She cautions that Prophet 21 can seem "HUGE, due to the endless possibilities of the system...but you have to learn how to use it. That's where Epicor Professional Services comes in."

Bennion praises the willingness and know-how of the Epicor support team. "If you can't figure something out or you want to do something and don't know how, they'll help you with whatever you need," she says. "For example,



we wanted to create a process that wasn't in the system, so via discovery sessions with an Epicor specialist, we learned how to use Secondary Processing for it, and made it completely automated. Support from Professional Services makes it so easy; it's all at our fingertips, and doesn't cost an arm and a leg."

She also appreciates how the flexibility of the Prophet 21 system meets PTI's business needs. "When I started on the system, I was expecting just a generic user manual, but you don't have to cater your business to Prophet 21; there are so many different ways to make it work for you, to do exactly what you need to run your business," Bennion observes. "For example, you can pull information from Prophet 21 and export it into Microsoft® SQL Server® or Crystal Reports® to look the way you want. It's worth its weight in gold." Most recently, PTI has used the Prophet 21 Crystal Forms capabilities to modify forms regarding consignment inventory locations so that a customer could read and understand them accurately.

Employees train themselves!

According to Bennion, the Epicor Learning Management System can benefit even small distributors. PTI has 13 employees, and has used the LMS beginners' courses on Prophet 21 extensively. "It's the easiest training I've ever done in my life," says Bennion. "It's good for learning the Prophet 21 system before jumping in; employees are able to ask questions beforehand. If we attack business objectives before people start actually using the procedures, it reduces the need for 'untraining' of bad habits later."

In a small company like PTI, this is very valuable, because by the time employees are ready to go on the live system, they've trained themselves, which Bennion credits for a quicker ramp-up. "We provide access to the Prophet 21 'play' database to give people a feel for it, and allow them to explore with no consequences, before it becomes real," she explains. "You need to let them test 'if/then' scenarios, explore new modules, figure out different ways to do things, and make suggestions or give feedback. Prophet 21 provides that capability because it is so open."

Results: Improved customer service levels and bottom-line impact

Bennion believes the company's valuation has "skyrocketed" as customer service levels have gone up: "We're becoming a 'name' in the industry, without doing any marketing! It's all about having the data at the click of a button when they call."

From 2007 to 2011, PTI increased its annual revenues from \$5 million to \$9 million, while only adding two employees to its workforce. "Prophet 21 does most of the work for us," Bennion states.

Asked what she would do differently in hindsight, Bennion responds, "I would have used Epicor's Professional Services more, and much sooner...I could've saved myself a lot of time! That's what they're there for. Epicor really listens and responds to its customers...They want to help you succeed!"

About Epicor

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