



# Rethinking Digital Transformation:

Building a resilient supply chain by extending technology benefits to suppliers

**Client:** James M. Pleasants Company, Inc. (JMP)

**Industry:** Heating and cooling equipment wholesale



## Challenge

- Inefficient processes driving the need for digital transformation
- Limited access to critical sales data
- Manual reporting



## Solutions

- Microsoft Dynamics 365
- Arbela Data Insights
- Prepared for future capabilities with a cloud-based platform



## Results

- Improved sales processes
- Greater visibility and enhanced data analytics
- Optimized, more resilient supply chain
- Increased supplier market share
- Reduced supplier cost of sales



James M. Pleasants Company, Inc. (JMP), an employee-owned manufacturing and distribution business based in Greensboro, North Carolina, had experienced steady success over the years. The company saw significant potential for organic growth. To realize that goal, the leadership team at JMP understood that it had to invest in digital technology, laying the groundwork for business transformation and expansion.

Working with a network of more than 30 manufacturers across the region to supply its large inventory of heating and cooling equipment, JMP recognized that the success of the company is in large part driven by the success of its supplier network. Success of its manufacturers means success for JMP.

To keep up with evolving demands and gain competitive advantage, JMP needed to improve selling efficiencies and enhance their supplier relationship management. The company recognized the need for digital transformation but was held back by labor-intensive sales/quotation processes and insufficient workflow capabilities. JMP and its suppliers were reactive serving their customers, rather than proactive and predictive.

The challenge was exacerbated by operations in multiple locations across several states, with each field office having its own way of handling, mostly paper-based, processes. Employees and suppliers alike wanted more visibility into their quotation and opportunity pipeline, and data on lost opportunities.

**A unique approach to digital transformation: Extending benefits to suppliers**

JMP understood that technology would be the backbone for driving business transformation and improving efficiencies. However, they realized that extending some of the functionality to their supplier base could benefit both sides: Providing suppliers real time reporting on sales to better communicate/anticipate demand, as well as digitizing paper-based sales processes. The sales cycle in commercial construction is especially lengthy, requiring multiple customer approvals followed by manufacturing lead times that take weeks. Making their supplier base more efficient would make JMP more efficient as well. This is a somewhat unique approach that sets JMP apart in the marketplace. Essentially, JMP was looking to share technology benefits for more transparent demand planning and optimizing processes on both sides of

*"Moving our business technology to the cloud with Microsoft Dynamics, Azure analytics, and Power BI created the foundation for JMP for long-term success, as we were able to quickly adapt to remote work during the pandemic and turn our data into actionable insight, enabling us to build more effective customer relationships."*

Jamie Edmondson  
President  
James M. Pleasants Company

the relationship to reduce cost of sales. This level of cooperation enables JMP's supplier organizations to start their own digital transformation, increase their market share and revenue and together build a more resilient supply chain to better serve the same end customers across shared regions/territories.

The company turned to Microsoft and their business applications and cloud services to help them in their digital transformation journey. Microsoft then connected the JMP team with Arbela Technologies to implement Microsoft Dynamics 365. After measured analyses of JMP's goals, market, platforms, and processes, Arbela designed a cloud-based, enterprise-wide solution to integrate all business processes and data. The team upgraded JMP's core platform with a complete stack solution using Dynamics 365 and other Microsoft services. The solution was built on the cloud, including Azure Data Factory, Power BI, Dynamics 365 Finance, Dynamics 365 Supply Chain Management, Dynamics 365 Sales, and Dynamics 365 Customer Service. A value mapping was the first step and was done to ensure alignment between Microsoft stack solutions and JMP's strategies and objectives. Arbela then evaluated JMP's business requirements to implement the right capabilities.

### **Improving sales processes with actionable data insights driving deeper engagement**

Dynamics 365 Finance and Dynamics 365 Supply Chain Management automated many critical steps, and Arbela's pre-built software solutions ensured rapid information sharing and integration across multiple systems and locations. Operational status updates from Dynamics 365 Finance and Dynamics 365 Supply Chain Management are now automatically shown within Dynamics 365 Sales processes to provide a vastly improved user experience with self-service capabilities. Additionally, with the move to the cloud, this enabled JMP to seamlessly transition to remote work, giving them a competitive advantage and passing it on to their suppliers, during the pandemic. The integrated enterprise solution empowers sales reps with real-time information they can use to solve challenges, drive upsells, and create a more satisfying experience for their suppliers.

The new solution enabled JMP to eliminate paper processes and fully integrate and automate the transfer of information. Within the first year of implementing Dynamics 365, JMP has optimized its sales process, resulting from a new digital customer engagement experience and the automation of existing processes. JMP employees now spend less time solving problems and more time innovating new products and services because they are able to act on predictive data rather than reactive data. Through automation and standardization of sales activities that enable more frictionless sharing of information, JMP is quickly emerging as an innovator and trendsetter establishing a hub for industrial product suppliers, who are looking to align themselves with digital transformation and position themselves for success.

To learn more contact us today at [info@arbелatech.com](mailto:info@arbелatech.com).



### **About ArganoArbela**

ArganoArbela is a global consulting firm and top-rated Dynamics 365 gold certified partner that empowers organizations around the world to digitally transform and grow their businesses. Our expert consultants offer strategic consulting, implementation services, support and managed services as well as pre-built software solutions that help our clients innovate using Microsoft Dynamics 365, ERP, CRM, Business Intelligence/Analytics and related Microsoft cloud solutions.