

## Choosing a Product Configurator – A Customer Conversation

**“The CDS technology enables customers to match their products to unique requirements by accommodating great complexity in a simple-to-use interface that provides increased efficiency along with strong visual feedback; helping to educate, enhance the user experience and ultimately shorten the sales cycles, while lowering the total cost of ownership.”** Marc Macaluso, eBusiness Manager, Emerson Power Transmission

**CATALOG**  
DATA SOLUTIONS



**Problem:** What do you do when you have a highly complex product line – in this case the Emerson Power Transmission Browning CbN 3000 Gearmotors & Reducers - that can be ordered and built in more than a million possible ways of which some sixty thousand different dimensional configurations are available? Add that it's prohibitively expensive to build and stock sixty thousand variations so you must build to order and at the same time solve the usual manufacturing industry goals – increase sales, shorten the sales cycle, decrease time to market and lower operating costs. What do you do?

**Solution:** The CDS configurator with its *Visual Constraint Feedback*<sup>™</sup> is superior to traditional configurators, according to Marc Macaluso, eBusiness Manager at Emerson Power Transmission, his team and colleagues. The Emerson eBusiness group teamed with CDS to solve the problem in a new and unique way as this interview describes.



### Browning® CbN 3000 Gearmotor & Reducer

for selecting and ordering our complex products, let customers help themselves, shorten our sales cycle, reduce our time to market, increase sales and lower cost of sales through internal efficiency gains that lower operating costs. We also wanted to replace our current 2D part generation system that we download to AutoCAD<sup>®</sup> users (an AutoLisp<sup>®</sup> program) with a more modern, more intuitive 3D equivalent.

**CDS:** What benefits were expected and achieved? Can you quantify the value of the CDS Configurator with the patent-pending *Visual Constraint Feedback*<sup>™</sup> vs. traditional configurators?

**Marc:** In a few months time we'll be able assess the usage of this new application. The *Visual Constraint Feedback*<sup>™</sup> was a critical component. In a complex product, users usually don't know the constraints and they almost certainly don't know the interdependence of those constraints (i.e. if you select X you are giving up option Y in selection Z). The *Visual Constraint Feedback*<sup>™</sup> makes you aware of what effects any selection has on future choices. Substance is vital, but customer perception is even more important for successful adoption. I call the CDS Configurator a “3<sup>rd</sup> generation interface” and expect to see it imitated because of its simplicity of use and cycle elimination – it provides efficiency for the user and feedback that educates to further increase efficiency.

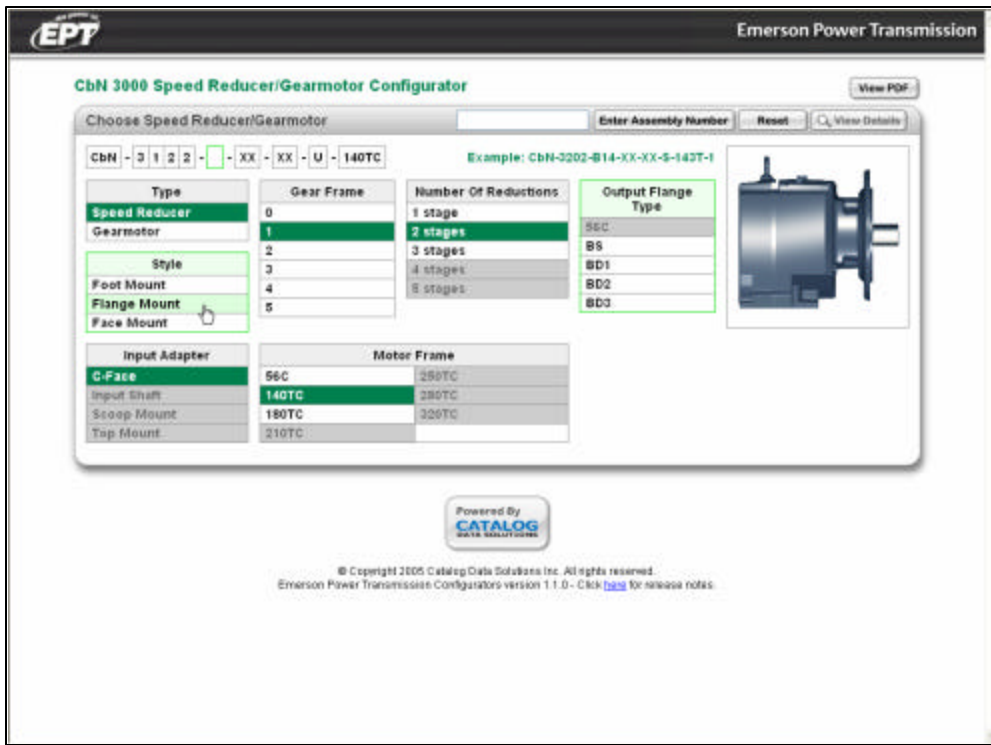
***“The Visual Constraint Feedback<sup>™</sup> makes you aware of what effects any selection has on future choices”***

**CDS:** Can you quantify the value of the CAD model downloads for Emerson Power Transmission and for your customers?

**Marc:** For our customers, efficiency gained will come from reduced communication dialogue with the expert system – customers prefer immediate self-help and download capability versus asynchronous communications of listed

## Catalog Data Solutions Case Study

requirements and multiple emails. Internally we anticipate some relief for high value technical resources through customer self help that frees up our resources from CAD model retrieval and communication. We are already tracking stats daily and accumulating the metrics but it will take a more data to assess frequency of use and reduction in the use of internal resources. Then we'll be able to assess performance versus our business case and ROI.



**CDS:** How many CAD model downloads do you expect each month from the CbN 3000 and who do you expect to use the configurator?

**Marc:** We expect 15-20 thousand downloads per year, while at the same time phasing out our AutoCAD® based 2D part generation system. The users of the 3D configured models are the design Engineers at OEM's and Gearing 'build houses' that exist across the country that currently access the EPT EDGE® Online website, for a range of Engineering oriented tools. This application will support them very nicely. We will also ensure that it is

available internally; making it available to field sales personnel and technical support for handling customer inquiries. We will also use it for training new staff. For example it typically takes 6 months for a new technical person in our company to get up-to-speed on our products and usually several years before they are competent to work directly with customers – we anticipate shortening this process dramatically.

**CDS:** Why was CDS chosen?

**Marc:** Time to market. CDS demonstrated the ability to deliver quickly and at the same time do it in a price competitive manner. Additionally, there was the 'wow factor' of CDS patent-pending *Visual Constraint Feedback*™ versus traditional configurators. CDS presented the ability to deliver the most advanced technology within the simplest of interfaces. It came down to a single and clear choice in selecting them as our partner. CDS professional services were vital too – our own internal CAD resources are overloaded, so the ability of CDS to produce needed 'envelope' CAD models for download was a key part in the equation. For obvious reasons we don't want to externally download the IP of our detailed designs, nor do users need to deal with the larger size of those models. CDS' flexibility through these services made them a true partner not just a software supplier – they did in six weeks what could have taken us six months.

**CDS:** What other similar technology does Emerson use and how do you differentiate CDS from that technology?

**Marc:** We have Oracle Configurator for the shop floor but it's not customer facing or ready to be enabled as a 3D CAD provisioning tool and the lead-time to get it implemented is years. We decided it was worth the cost to have the competitive advantage of the CDS patented *Visual Constraint Feedback*™ despite possible overlap of technology. We use another supplier to handle Emerson non-configured CAD models and they do an acceptable job with that. But our existing CAD model supplier, and the other suppliers we evaluated, were not up to the challenge of complex configured CAD geometry and couldn't match CDS' technical ability, flexibility and advanced interface, so CDS was the clear choice.

**"We have Oracle Configurator for the shop floor but it's not customer facing nor ready to be enabled as a 3D CAD delivery tool.."**

**"...our existing CAD model supplier, and the other suppliers we evaluated, were not up to the challenge of complex configured CAD geometry and couldn't match CDS' technical ability, flexibility and advanced interface, so CDS was the clear choice."**

## Catalog Data Solutions Case Study

**CDS:** What lessons were learned from implementation and suggested improvements?

**Marc:** We selected the right partner. We staffed the project with the right knowledge workers, who delivered the constraint data, and CDS was nimble and flexible in delivering the software application as promised. The development of a successful pilot ensured we had Executive sponsorship. We presented the most complex product line to be sure the technology could handle everything we were likely to throw at it. The project planning, management, QA and testing all went exceptionally well using the CDS iterative prototyping methodology. Another tool CDS provided was the CDS' online QA servers, which allowed resources from across EPT to participate in the testing.



**CDS:** What are your future plans for this technology?

**Marc:** The infrastructure is now in place and we have the process and methodology to move expert knowledge into the system. We did our most complex product first, so we can now confidently scale to all our configurable product lines. Beyond that we want to look at applying the system to other Emerson offerings such as Couplings and Bearing products. There are also opportunities to enhance our renewal/spare parts selling initiatives. We will have a long and rewarding relationship grounded on the success of the first configurator. In the long term this will support all our selling channels but our primary target is the OEM design engineer.

**CDS:** What is your overall satisfaction with CDS and willingness to recommend CDS?

**Marc:** I usually walk away from projects thinking that we could have done something differently that would have made it better, but in this case I wouldn't have changed anything in the way that Emerson and

CDS executed this project. CDS willingly prepared a pilot to support 'selling' the concept to our steering committee. They fulfilled everything they promised. Emerson had the right people involved – including a skilled project manager, the right executive sponsorship, addressed any cultural issues that might have endangered the project, drew out the constraint information from the experts and executed the build, QA, deploy and maintain cycle carefully and thoroughly.

Bottom line, it's further fulfillment of the efficiency gains the web can offer – deliver fully configured and defined products to fit a specific users requirements at the users 24x7 convenience with minimal Emerson resources.

***"I would highly recommend CDS to anyone as we felt confident from the very first interaction - they are a very special company - and I would willingly provide references for them."***

I would highly recommend CDS to anyone as we felt good right from the very first interaction - they are a very special company - and I would willingly provide references for them.

