

# Journey to Success with

**FOLEY** **CAT**

**ZIEGLER** **CAT**

**GECOLSA** **CAT**

**POB** **CAT**



# In the dynamic landscape of the equipment and material handling industry, staying competitive and agile is **key to success**.

To meet the growing demand for heavy equipment dealers to improve performance, enhance operations, and upgrade customer response and satisfaction, XAPT presents the NAXT365 solution, a next-level offering that redefines the way dealers operate across various functional areas, all in the pursuit of an exceptional sales and customer experience.



**INTEGRATED BUSINESS PROCESSES**



**REAL TIME DATA & ANALYTICS**



**IMPROVED SALES RESULTS**



NAXT365 is a leading solution tailored for equipment dealers that leverages the power of Microsoft Dynamics 365. More than a software platform, NAXT365 is a partnership that presents a comprehensive, end-to-end business transformation system singularly focused on delivering unprecedented value by seamlessly combining cutting-edge technology with a deep understanding of the intricacies of the heavy equipment industry.

NAXT365 is the result of XAPT's collaboration with Microsoft Dynamics 365. This customized solution is built on Dynamics 365 to guide Caterpillar dealers through their digital transformation initiatives. This comprehensive platform, built specifically for the heavy equipment industry, integrates over 700 customized processes, leveraging NAXT's decades of experience and deep knowledge of Caterpillar dealer operations.

This represents the synergy of knowledge and Microsoft's state-of-the-art ERP platform. NAXT365 empowers dealers to seamlessly transition to a modernized system, amplifying efficiency,

scalability, and the utilization of cutting-edge technologies such as Artificial Intelligence. The ongoing joint investment from XAPT and Microsoft underscores our commitment to delivering a best-in-class, end-to-end, and fully integrated solution, elevating the dealership experience to new heights.

NAXT365 enables organizations to effortlessly integrate key business functionalities, including Finance, Parts, Sales, Rental, Service, Power Systems, Purchasing, Supply Chain, Human Resources, Customer Relations and Customer Portal functions in real-time, creating opportunities for improved connectivity across the organization, with increased speed and accuracy.

Although each dealership has a different approach to renting, selling, and servicing Caterpillar equipment, all of our customers approached XAPT seeking a technology-focused partner, intimately familiar with the dealership community and capable of creating new connectivity to their business to engender new growth.

# 01



## Implementation Excellence

NAXT365 was created for dealers looking for a future-forward, technology-driven, dealership-centered solution to simplify business operations and connect large organizations across multiple locations, departments and responsibilities.

Organizations like Foley, Inc., a New Jersey-based Caterpillar dealer with a 50+ year history, began business when the automobile was still emerging. Over the past 60 years, Foley has grown to nearly 800 employees in five locations in the northeastern United States. As the organization grew, so did the systems to help keep them integrated.





We're all working with Caterpillar. We're all dealerships. We're selling the same thing. But the inner workings of each organization are important. Even though we have so many similarities, our processes and culture can be completely different, and that's an essential item to consider in the process.



**Danielle Papenberg**  
Director of Organizational Development, Foley, Inc.

"We had created a homegrown approach, patched together over the years, because of work that Dealer Business System (DBS) could not support. At one point, we had counted over 70 apps we had developed in-house just to make our day run," explains Danielle Papenberg, the NAXT365 project manager and Director of Organizational Development for Foley. The end goal for NAXT365 implementation was "one localized system that employees could use across the organization. . . to make us more efficient and more productive from an internal standpoint," she says.

Foley's leadership was strategic in setting up the implementation team, with representatives from the front line of the business and every function, with support from directors and C-suite executives, to find "a Microsoft provider that was future-forward technology focused, and most importantly, was one that was within the dealership community," Papenberg says.

There are many similarities among XAPT customers; however, the implementation of this technology platform is unique to each organizational user. "We're all working with Caterpillar. We're all dealerships. We're selling the same thing. But the inner workings of each organization are important. Even though we have so many similarities, our processes and culture can be completely different, and that's an essential item to consider in the process," Papenberg says.

The XAPT partnership guided the integration of the NAXT365 system, adapting and enhancing the Foley process and creating a sense of connectivity throughout the organization. With a team of XAPT experts, Foley is beginning to harness the power of NAXT365 to optimize processes, reduce costs, and improve efficiency, announcing a return to normal business operations post-implementation three months earlier than predicted.



## Journey to Success



**ORGANIZATIONAL CONNECTIVITY**



**OPTIMIZED PROCESSES**



**REDUCED COSTS**



**IMPROVED EFFICIENCY**



# 02

**ZIEGLER** **CAT**<sup>®</sup>

## Innovation at your Fingertips

The NAXT365 solution is not just a static tool; it's an ever-evolving ecosystem that keeps our customers' business ahead of the curve. With regular updates and enhancements, technology investments will remain relevant and impactful. Isaac Berling, Director of Enterprise Applications at Ziegler, explains that NAXT365 has given organizational leadership a real-time view of the business, and the ability to see everything that is happening, allowing a new visibility of the dealership as a whole. Although the dealership is connected across departments and locations like never before, the innovation available to the organization continues to reveal itself.





Implementation was the beginning of the race. The real work started once we went live to figure out to how to build off of this platform.

NAXT has been a big piece of starting to digitize our business across all areas, as well as creating a consistent way that our people are doing their jobs.



**Isaac Berling**  
Director of Enterprise Applications, Ziegler CAT



**Connecting the Caterpillar Dealer Community**

The NAXT365 platform's adaptability, scalability and efficiency meets the unique needs of businesses around the world. From North and South America to Europe and beyond, XAPT's footprint in the global market continues to grow, reinforcing our position as a preferred choice for organizations seeking robust ERP solutions tailored to the Caterpillar industry on a worldwide scale.

"Implementation was the beginning of the race. The real work started once we went live to figure out how to build off of this platform," he says. New visibility has increased collaboration across the organization, making this Caterpillar Dealer with over 30 locations and nearly 2,500 employees more agile. Berling says that "we are just scratching the surface of all of the data that we can harvest from this system." The team is now able to combine the data coming out of NAXT 365 with visualizations in Power BI to create meaningful insights into operations that were not possible five years ago. According to Berling, "NAXT has been a big piece of starting to digitize our business across all areas, as well as creating a consistent way that our people are doing their jobs." Information now seamlessly flows throughout the organization, which supports Ziegler's mission of maximizing customer uptime. The team is currently working on the implementation of Dynamics field service to improve their scheduling, dispatching and customer communications and capabilities. "It has been a big challenge, but it also forces us to live our value of continuous innovation in our organization, of always looking at how do we do things better," Berling says.

The adoption of NAXT365 has more benefits than creating increased connections and visibility internally. In addition to support from the XAPT team, part of the NAXT365 offering is the connection to the network of dealers within the Caterpillar community. "Microsoft Dynamics 365 and NAXT kind of act as this connective tissue between dealers," Berling says. He remarks that during the implementation of their project at Ziegler, there were many times when they did not quite know how to connect the dots on a process or the functionality of a system. Other Caterpillar dealers, who had been through the process previously, were able to walk through their own process, giving the Ziegler team additional insights to help move their own business forward.



# 03

**GECOLSA**



## Functional Areas **Transformed**

From financial management to supply chain optimization, NAXT365 covers a wide array of functional areas in an organization. It eliminates disjointed systems and data silos, and embraces a unified platform that streamlines operations. With NAXT365, dealerships can unlock unprecedented visibility and control across all facets of the business.





Not only do we have multiple territories, but we also have multiple currency sets as well, and we have different-sized businesses within our group. We really saw NAXT365 as a complete solution for us.



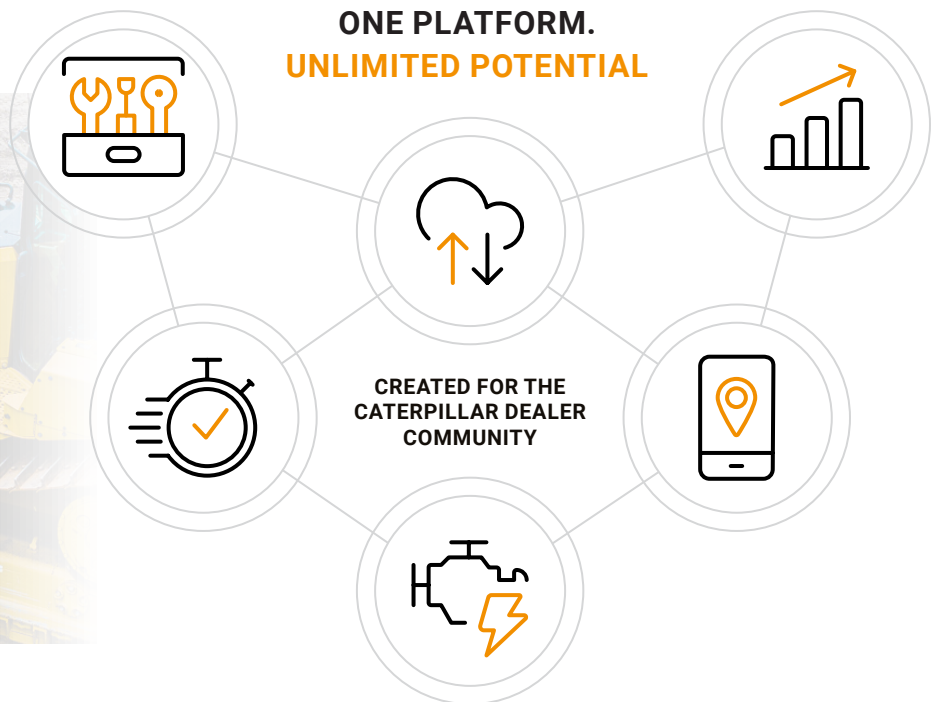
**Ahiro Guzman**  
Business Transformation Manager,  
Soluciones Empresariales 360°

Ahiro Guzman, the Business Transformation Manager for Soluciones Empresariales 360°, a Colombian-based organization that serves dealers and Relianz Mining Solutions, explains that with the company's legacy system, departments would often present differing data results. "There was somewhat of a struggle between operations managers and our finance teams when they were to agree on a monthly basis on our results," he says. Increased transparency and accuracy between departments and locations were a necessary step in the company's long-term growth strategy. Of the century-old organization, Guzman says, "Gecolsa has been here for 100 years, and

we want to be in the game for 100 more and even more as we approach this challenge to transform the way we handle our business." Integrating NAXT365 was part of a larger change management project for Gecolsa and was dubbed Project Be Strong. The result is new organizational strength. Now that the dealerships live within the Microsoft ecosystem in NAXT365, employees are able to collect, validate, and access information like never before. "Our technicians collect data at their workstation to validate whether what they are reporting on is within specifications or not and letting them know right away what the next step should be," he says. The dealerships are

able to track workflow, equipment status, and more with greater agility but realize that the greatest benefit to their functional areas may not have fully revealed themselves yet.

Like many Caterpillar dealerships, Gecolsa and Relianz have a diverse business landscape that NAXT365 was able to unite. "Not only do we have multiple territories, but we also have multiple currency sets as well, and we have different-sized businesses within our group. We really saw NAXT365 as a complete solution for us," Guzman says.





NAXT365 has improved customer relationships, employee management and service management, explains Martin Briggs, President at Relianz Mining Solutions. "I think some of the benefits we've received after we implemented NAXT365 is that we've had better and faster access to data, which allows us to make decisions more in real-time than the lag we had with our previous system," he says. Briggs notes that NAXT365 is seen as a complete solution across multiple businesses within its group of companies. Although NAXT365 was adopted to streamline the organization's Caterpillar business, they expect to expand the use of the platform into other businesses. "We really saw NAXT as a complete solution for us that not only serves us well for our Caterpillar businesses, but it is also going to serve us well for other businesses in our group as well," he explains.

It is not just decision-making, however. The NAXT365 offering creates more efficiency in the field. Ahiro explains that thanks to greater connectivity and access to information, their field technicians can now spend more time in the field. "Now we can have our field technicians in the field most of the time. They rarely have to show up at the branches because we can just send their work, and they just drive off from home wherever they are needed," he says. NAXT365 has enabled teams to make better-informed decisions at a much faster rate, helping the organization stay true to its mantra of quality, velocity, and cost. He sees NAXT365 as a catalyst for interactions that help the organization deliver on all three points. More than just a technology platform, Briggs and his team say that the organization now operates as "one team" as a result of the relationships across functions and locations, something that NAXT365 implementation and use has helped to facilitate. With new data and functions at their fingertips, Briggs says that NAXT365 is a platform built for change that understands an organization's constant evolution within the Caterpillar community.



We've had better and faster access to data, which allows us to make decisions more in real-time than the lag we had with our previous system.



**Martin Briggs**  
President, RELIANZ Mining



# 04



## **Elevate Sales and Customer Experience**

At the heart of any successful business are its sales and customer experience. NAXT365 empowers teams to excel with real-time data insights, improved collaboration, and the tools they need to close deals.

Moreover, customers like Pon-Cat, a Caterpillar dealer with 1500 employees in both the Netherlands and Norway, benefit from a seamless and personalized experience that fosters loyalty and long-term relationships.





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**Ben Van der Werff**  
Product Owner NAXT, Pon Equipment and Pon Power

Pon-Cat leadership was looking for a solution to help them improve their customer experience with a more agile, collaborative organization to this sector of their business, which supplies Caterpillar equipment and services. “We were looking for a more modern landscape, easier to adapt to, but also more flexible in this ever-changing world and fast-changing world so that we could keep pace with what’s happening around us,” says Ben Van der Werff, Product Owner NAXT at Pon Equipment and Pon Power. However, in a scattered landscape, it was difficult to manage customer expectations without real-time data. Now, employees can all make decisions with the same data set. “One set of data going all the way from prospects to the actual delivery means that we experience a lot fewer misunderstandings about how the different options that we sell to the customer,” Van der Werff explains. Now, there is a new level of digital trust within the organization, meaning that employees know that they are receiving accurate, real-time data and can make informed decisions as a result. Now that NAXT has been in use within PEPP, Van der Werff says that there is a greater realization that “NAXT is a simple solution that is really so complex in itself, yet at the same time, simplifies your universe.”

NAXT365 was the first new system for PEPP in decades. However, it will not be the last since the platform will continue

to evolve and grow along the way. Van der Werff explains that NAXT365 is a catalyst for continuous change within the dealership. “Continuous change is the new constant,” says Anders Roil, Director of Digital at Pon Equipment & Pon Rental.

PEPP’s evolution of its business with NAXT365 has led to an improved customer experience overall. Sales, field service, and mechanics now have increased connectivity. Technicians can now receive information on their phones or tablets and do service reporting on-site, which is immediately accessible to the team. The team is now seamlessly integrated thanks to the NAXT365 environment, “which means that we are able to offer help in the environments on the moment that the end user needs it, in the context that the user needs it,” says Roil. Access across the company to one data set has benefits when it comes to customer service as well. Roil explains that there is now one set of data from prospects to the actual delivery, which has created a more efficient and accurate process that helps in the environment in the moment that the end user needs it. It’s not just access to one set of data but also the real-time access of it. Access to real-time data “significantly increases our understanding about what’s going on and increases our decision-making speed and our decision-making quality,” he explains.



**FASTER ACCESS  
TO DATA**



**BETTER BUSINESS  
DECISIONS**



# In an era where adaptability, efficiency, and agility are paramount, NAXT365 stands as a beacon of innovation, empowering customers not just to survive but thrive.

With NAXT365 as a partner in driving efficiency, innovation, and customer satisfaction, it can transform how your business excels in today's ever-evolving landscape. This cutting-edge product is not merely a software application; it's a game-changer that streamlines processes, enhances productivity, and redefines the customer experience. With NAXT365, XAPT has once again raised the bar, enabling clients to achieve new heights of success.

NAXT365 not only better connects employees across office locations and departments, but it also allows for effortless integration of key business functionalities, including Finance, Parts, Sales, Rental, Service, Power Systems, Purchasing, Supply Chain, HR, Customer Relations and Customer Portal. The integration of these core business functions allows organizations to streamline operations, resulting in better, faster, more accurate work.

## NAXT · XAPT

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