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Customer Story
Levelpath Centralizes Procurement in EV Commercial Transportation

48%
Decrease in procurement cycle times

40%
of purchase request processes transformed

180+
Projects managed within six months

Key Benefits

- ✓ Established company-wide centralized data for better supply chain visibility

- ✓ Transformed purchase request processes by 40% with AI-driven support

- ✓ Enhanced data accuracy and compliance with automated tracking

- ✓ Reduced cycle times by 48% for users with one easy-to-use platform

- ✓ Managed 180+ projects in their first six months

As a non-traditional company, this manufacturer of heavy-duty zero-emission commercial vehicles found themselves constrained by rigid procurement solutions. Traditional ERP systems were not flexible enough to support their rapidly evolving needs.

A pioneer in EV commercial transportation, the business needed a more flexible way to manage purchase requests, gain upstream visibility and control, and ensure data integrity across their procurement systems. Their goal was to empower their employees to drive that vision using intuitive processes that eliminated frustration and incomplete purchase orders. In a perfect world, they would find a way to do it all without paying for expensive upgrades within legacy tools.

They found the solution in Levelpath.

The business saw the opportunity Levelpath offered them to centralize their existing solutions in one place and use the AI-driven platform to automate tasks and establish workflows that enhanced their sourcing processes.

The team goes to Levelpath for everything. It's the front door to begin the day. It's the last thing they check when they leave the building. It's really given them that end-to-end opportunity to see everything that's within their wheelhouse."

Global Head of Information Technology and Cybersecurity

Executive Summary

This EV commercial transportation manufacturer is on a clear mission to create a zero-emissions world using integrated truck and energy solutions. They push the boundaries of possibility, made by and for those who lead, developing battery-electric and hydrogen-fuel Class 8 vehicles (heavy-duty vehicles weighing more than 33,001 + pounds) alongside HYLA, the innovative energy brand focused on building a complete hydrogen refueling ecosystem.

As they took on the unknown, the unnamed, and the undiscovered, they knew they needed to address the procurement challenges that come with scaling to support their ambitious vision. By partnering with Levelpath, they centralized procurement data, streamlined purchase request workflows, and implemented AI-driven automation to achieve reduced errors, improved compliance, and more efficient, empowered teams.

Disconnected Systems Create Inefficiencies

Whether it is to get supplier data, input a purchase order, or otherwise, having to bounce between various systems is not just inefficient, it puts a company at risk of incomplete orders and compliance issues. The business wanted to avoid these and other issues as they grew.

They have hit significant numbers with their battery electric vehicles and hydrogen-powered Class 8 trucks and have recycled or reused hundreds of metric tons worth of batteries to reduce waste. As impressive as these accomplishments are, procurement leaders within the organization recognized they could only sustain them if they changed the way they managed their data and processes.

"We had a lot of pain points as an organization in how we were beginning to scale the enterprise, and some of the challenges were growing pains that we were solving with many different tools," says the Global Head of Information Technology and Cybersecurity.

These disconnected systems resulted in manual workflows and data changes that slowed their teams down as they tried to complete their tasks. The Global Head of Information Technology and Cybersecurity saw the impact this had on his team's day-to-day as they had to "chase emails and stakeholders to find out where something is in a process."
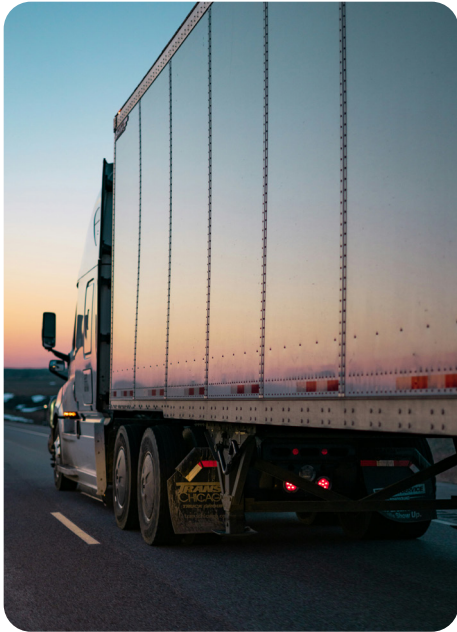
There was a lack of clarity in their daily operations and a sense of frustration because they had to work within so many systems. Unfortunately, this was not the only place their procurement team was feeling strife.

Complicated Purchase Order Processes

The EV commercial transportation manufacturer had been managing purchase orders and purchase requests entirely in its legacy system. While this should have enabled them to breeze through PRs with ease (after all, such a well-known solution should be user-friendly, right?), it came with a host of problems.

- **Lengthy Processes:** For starters, submitting a PR within the legacy system was a lengthy process that required specific ERP system training. That meant they either had to take time to train all team members on the system or hope that those who did know how to work within it were available to help with POs and PRs. Either way, it was not an efficient process.

- **Irritated Users:** Because the system was so complex, users would often become frustrated with the PR process. In some cases, they may circumvent the process and request goods without properly allocated funds, resulting in incomplete PR/PO processes.

- **Undefined Accounts:** The Cost Center and General Ledger accounts also were not clearly defined with the legacy solution, leading to invoice bottlenecks as the team received invoices for items without allocated funds or with listed POs that have exhausted funds.

- **Lack of Visibility:** There was very little visibility or purchasing input until after the purchase request was created, leading to bottlenecks and avoidable mistakes.

They knew they needed something new if they were going to successfully scale their business, meet their goals, and improve their employees' experience. When exploring other systems, the team saw the value in Levelpath's flexibility and AI foundation, especially in regard to its future goals.

Their New Product Introduction Project Manager, claimed, "We wanted something that was more flexible and seemed newer to the user. We could see that Levelpath was something that was very valuable, and they were also leveraging AI, so it seemed like something that was a good prospect for us."

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> They had a vision for where the product was going that aligned with some of the capabilities that we needed. This allowed us to be able to be a part of the solution, be a part of the process, and also ensure that it was built in a way that we could leverage it and make the most of it."
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> Global Head of Information Technology and Cybersecurity

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> Levelpath has given us an opportunity to allow people in the organization to become champions because they design it in a way that it could be leveraged and championed by anyone in the organization."
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> Global Head of Information Technology and Cybersecurity

Achieving Connectivity with Levelpath

As soon as the team implemented Levelpath, they noticed a difference in how easily the platform solved the problems caused by disjointed systems, allowing them to change how they managed their daily processes.

Centralizing Daily Processes

With Levelpath, the business transitioned from bouncing between systems for supplier data and PO/PR updates to having everything available in one centralized platform.

As the Global Head of Information Technology and Cybersecurity puts it, "Our company had a few technology challenges related to sprawl and access to information level. Levelpath gave us that central place to be able to point end users, our employees to one location to get the information they needed."

This consolidation of data meant that their procurement teams could "focus on the work and not have to chase the business process. It's given the team time back because they're able to utilize the tool and leverage their business processes within the solution."

Their teams were also able to use the centralized data to avoid conflict and the resulting delays they caused. The New Product Introduction Project Manager spoke of those benefits, saying, "We all work within one system, so everything we work on is archived. Having an archive of every decision the business has made definitely leaves contention out of anything, as there are just facts laid out in front of you."

Automating with AI

From the outset, the team knew Levelpath's AI-driven workflows would greatly impact their processes. This prediction came to fruition and changed the company's operations management.

In speaking about the more impactful ways the company leverages Levelpath's AI, the New Product Introduction Project Manager says, "It's definitely using the AI Assistant. We used to rely on manual workspaces that provided all the detailed information for building documents by hand. Now we simply prompt Levelpath's AI Assistant to generate the documents for us, which saves us more than 50% of the time from our old process."

She went on to say how Levelpath's AI Assistant saves her team time and effort putting together concept sheets.

"We have a workflow that we designed that was capturing all of the information that we were previously capturing manually on what we call a concept sheet—the part numbers, the change to the part number, what system it affects, et cetera, as well as pricing.

"Now, since we capture all of that within the workflow, once the workflow is completed, we can prompt the AI to generate that concept sheet for us."

The manufacturer also saw the impact the solution's AI had in direct sourcing and aligning cross-functional teams.

The New Product Introduction Project Manager explained, "We use Levelpath for any direct sourcing. That is new sourcing for new products as well as changes against existing products that we already have sourced. We are able to modify the workflows to pull in exactly what cross-functional teams we need, whether it's a new sourcing or a change for existing sourcing, and it gives us an archive of any decision and any answers from all the cross-functional teams."

Their Global Head of Information Technology and Cybersecurity further elaborated on the positive impact this had on the business overall. "We started with direct items, and that was a great opportunity to bring the entire sourcing team and the engineering team into the solution and let them see firsthand how we can align our business processes to succeed."

Revolutionizing PO Processes

Perhaps most importantly, the business was able to leverage Levelpath to improve its historically complex and frustrating PO/PR processes. They plan to integrate Levelpath with their legacy system to enhance purchasing processes and add upstream visibility, taking a two-pronged approach to solving current challenges.

By moving purchase requests into Levelpath, they will gain:

- **Enhanced Data Accuracy and Reliability:** Levelpath will allow them to limit PR requester access in the legacy system to strictly authorized users, minimizing errors and allowing for more accurate data within the legacy system.

- **Improved Visibility and Oversight:** They can use Levelpath to gain complete visibility into PR requests for all relevant upstream departments, empowering greater oversight, quicker identification of PR issues, and reduced invoice processing delays.

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> Being able to use Levelpath's AI as a catalyst to start a process, whether that's an agreement or a bid or enriching a supplier record, has been priceless."
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> Global Head of Information Technology and Cybersecurity

> "Levelpath is giving us the opportunity to see our future sooner."
>
> Global Head of Information Technology and Cybersecurity

- **Comprehensive Training and Compliance:** By implementing Levelpath to limit PR requesters in the legacy system, they can focus on providing training to a set number of employees, promoting adherence to proper procedures, and reducing errors in PR creation.

- **Streamlined Processes and Reduced Invoice Backlog:** Since they can harness Levelpath to vet data, the business can ensure users correctly create PRs within the legacy system, reduce the need for edits or changes, and minimize the overall backlog of invoices.

The cherry on top of all these improvements that Levelpath enabled was that the business could achieve them without having to pay for an expensive upgrade within the legacy system.

Building the Future with Levelpath

As the team continues to integrate Levelpath into more company-wide operations, they can already see the enduring impact it will have on their success.

"Levelpath supports our future vision in how they're developing technology that we'll need for tomorrow and allowing us to have access to that sooner. A lot of the capabilities that have been described that have been working through in the design sessions are things that we envisioned, and we didn't really have a way to make it happen. Levelpath is helping us make it happen," says their Global Head of Information Technology and Cybersecurity.

By centralizing processes, leveraging AI for automation, and enhancing visibility, the commercial transportation manufacturer is not just improving their procurement, it is future-proofing it. "Levelpath is giving us the opportunity to see our future sooner."
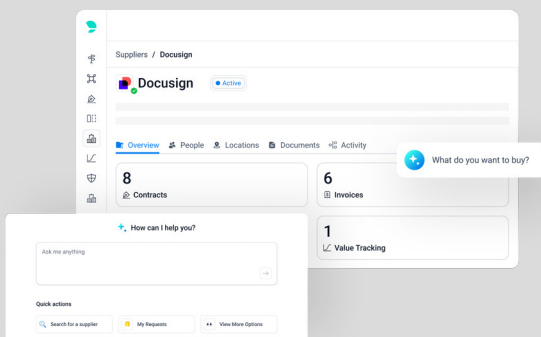
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Discover how Levelpath could help your business improve its procurement processes.

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