



CUSTOMER SUCCESS STORY

Quest

Quest

Quest Software helps customers solve complex technology problems with simple solutions. With Quest, companies of all sizes can reduce the time and money spent on IT administration and security. Quest has more than 100,000 customers worldwide across its portfolio of software solutions spanning information management, data protection, identity and access management, and Microsoft platform management.

Headquarters Aliso Viejo, CA

Website <http://www.quest.com>

Industry Computer Software

Simplus Services



Implementation Services



Advisory Services



Custom Configuration



Change Management



Managed Services

Salesforce Clouds



Salesforce CPQ



Sales Cloud



Salesforce Billing



Service Cloud



Pardot



Community Cloud

The Challenge

The team at Quest faced multiple challenges.

Legacy System Quest was using BigMachines as its CPQ solution. The proprietary nature of that system meant that integrating with Salesforce was difficult.

Administrative Burden Fully utilizing the legacy system was not an option. This placed a large administrative burden on the team, costing time and causing frustration.

Customized Documents Quest was in the process of a brand overhaul. That redesign required that the quote documents match the new design. As an organization with many sophisticated marketing clients, brand management was crucial.

Slow Renewal Process The process for renewals was time consuming. This manual process required cloning and data entry.

Manual Sales Quoting The Quest sales team used Word documents to create each quote manually. This process caused issues when math was done incorrectly. This process was also a substantial time investment for the sales team.

The Solution

Simplus helped Quest solve a number of challenges.

- Implementation** Simplus was able to fully implement Salesforce CPQ. This included configuring 2,500 products, 15 bundled products, and more.
- Pricing Management** The team at Simplus configured multiple pricing rules, which included automated, volume-based discounting, “percent of total” pricing for maintenance products, and multi-year discounts.
- Quoting** Simplus created and configured Quote Page Layouts and record types. This also supported versioning control with the ability to sync back to the opportunity record.
- Approval Processes** Simplus created multiple approval processes, which included six approval chains that went up to five designated approvers. In addition, six custom email templates were created.
- Document Generation** Simplus implemented two output templates that would automatically be created in PDF format from either the Quote Form or Proposal.
- Training and Enablement** Simplus created a training program to ensure the Quest team would be comfortable using the new changes. This included custom collateral, Q&A sessions, and supporting client-led trainings.

The Results

- Close Deals Faster** By utilizing the Pricing Management and Quoting processes implemented by Simplus, the Quest sales team is now able to deliver more proposals to their customers faster than ever.
- Correctly Branded Documents** The team at Quest no longer has to worry if a quote or proposal being sent out by a sales rep is incorrectly branded, as all of this is automated through the Document Generation in CPQ.
- Fewer Errors** With automated approval processes and simplified discounting rules, Quest now enjoys not having to worry about pricing errors and the lost revenue that can come with it.