D+A
Desouza and Associates Inc.

Security product manufacturer provides highly customized quotes using Salesforce CPQ

Company Category: Mid-market (> USD $100 Million)
Application Involved: Salesforce CPQ

The Customer
As a medium sized Manufacturing Company, specializing in security and protection services, our Customer offered a wide variety of security services. However, their Products had many features and provided a high degree of customization making the process of providing estimates to global clients very complex and time-consuming.

Key Challenge:
The Customer's sales executives were using an Excel-based calculator to provide estimates based on different configurations provided by the end-client. The time, effort, complexity and responsiveness of the Sales executive increased when the end-client wanted options with different product/feature configurations.

In addition, the quotes were saved as Adobe Acrobat PDF files and contained high definition images of their Security related Products.

Our Solution
1. Configured Steelbrick (Salesforce CPQ) with almost all out-of-the-box features and keeping the following in mind:
2. Cut Estimating time of the Sales executives.
3. Configured CPQ quote templates for two types of quotes.
4. Bundled Products so that products associated with specific products would be populated in the quote by default.
5. Allow Sales executives to deselect features and automatically adjust the price accordingly.
6. Create eye-catching quotes - For high quality print-quality images we extracted their images from their high-res Adobe files.
7. Added a discount feature to allow the Sales executive to decide how much of a discount to offer to clinch the deal.
8. Created an automated Approval process here so that the Sales executive could submit and get approval from her/his manager

Results
1. Cut down on estimating time and raised sales productivity.
2. Easily configurable to be updated to accommodate new products/rates
3. Tracking, reporting and decision making based of quotes that won vs lost, product combinations that were most competitive allowed the Customer to optimize how they quote as all of the information was now residing in Salesforce and viewable across other Sales Executives and Management.

salesforce registered consulting partner

1-800-536-9027
www.desouzaandassociates.com
e: info@desouzaandassociates.com