CPQ Implementation

365 DATA CENTERS

The client is a leading provider of hybrid data center solutions in ten strategic edge markets. They offer a robust, carrier neutral ecosystem and provide secure and reliable colocation services – cloud computing and storage, backup services, and Disaster Recovery as a Service DRaaS – that offer an easier way to scale business growth and connect to the cloud. Their services are secure and tailored for small and mid-sized businesses, telecom carriers and cloud service providers.

Challenge

365 Data Centers acquired a company called host.net. These two companies had different quoting processes. They needed a partner to synchronize their quoting process by implementing Salesforce CPQ.

The requirements included:

- Location based pricing to support geographically dispersed data centers

- Predefined discounts to be applied to products based on quote terms Multiple quote templates for different purposes

- Dynamic quote templates that show/hide specific information based on user preference

- Quotes to be routed through an approval process based on predefined conditions

- Automated contract and renewal process

Solution

Wilco Source helped the client go live with Configure, Price and Quote (CPQ) by implementing out of the box CPQ features.

To support consistent quoting with appropriate pricing for ten data centers in different regions of the country, Wilco Source implemented multiple price books that automatically applied the correct geography-based pricing based on data center location. This enforced company pricing policy and reduced quote pricing errors in the field. Predefined discounts at the product level were systematically applied real-time, based on the term of the contract. This allowed sales representatives to easily quote and compare different contract terms, and guaranteed the correct discount was always applied regardless of the length of the agreement.

Multiple quote templates were created to allow different information to be shown on the quote document for different needs.

- Template created for quoting purposes will not show billing details and technical information and will display a text "For Quoting Purpose Only" on the top of the quote document to indicate that it is for quoting purpose only and that an actual proposal will be sent later for signatures.

- Colocation & other services would show data center location on the quote document while non-colocation quotes do not show this information.

- Quote documents were generated dynamically allowing the user to choose whether a specific section is to be shown or hidden. Example: User has control to show/hide list of install address locations on the quote document.

Product subscription fields were used to manage the distinction between subscription products and products with a one-time fee. Grouping fields on quote templates were used to separate subscription products and non-subscription products thus allowing the client to easily understand their recurring charges and one-time charges.

Maximum acceptable discounts were defined at product level. Salesforce standard approval process is triggered whenever the discount applied by sales representatives exceed maximum acceptable discount. This allows sales representatives to offer discounts in permissible limits while still allowing them to offer higher discounts for valuable customers with proper approvals in place. Quote documents generated before approvals would contain a draft watermark to remind sales representatives that an approval is required. Measures are taken to disable sales representatives sending unapproved quotes to clients.

Workflow rules were defined to contract an opportunity once the quote is signed and accepted. This automatically generates a contract helping the client to efficiently manage their Accounts' assets and subscriptions without worrying to create these records manually.

Results

Wilco Source came up with a unique design of product structure, pricing and discounting options to meet the client's requirements. Our team also helped 365 Data Centers to integrate CPQ with Intacct billing application. Our user and admin training sessions helped them to adopt CPQ quickly.