



The SFDC relaunch represents a major milestone for our SFDC ecosystem and culminates work that had been started by Jade and Illumio alike. The launch has been quite successful. //

-Paul McClelland

Director, WW Sales Operations at Illumio

Business Requirements

- Sales Cloud Implementation and Optimization
- SteelBrick CPQ Implementation and Configuration
- Territory Management
- Advanced Approvals
- Guided Selling
- Product Configuration
- Products with Ramp
- Pricing Tiers
- Selling Scenarios (New, Renewals, Ramp, Amendments)
- Block Price
- Discounting
- Account Master Implementation
- Opportunity Flow

Business Challenges

- Account ownership based on territory was not being captured effectively
- Account records have duplicate data with the same contact details

Scaling Salesforce Sales Cloud® and CPQ Maturity for Silicon Valley Security Leader Increases Quoting Capacity from 20 to 30+ People

Products & Services

- Salesforce Sales Cloud®
- Salesforce Steelbrick CPQ
- Salesforce Lightning Experience
- Advanced Approvals

Client - Illumio

Industry - Data Center and Cloud Computing Security

About the Client

Illumio is an American business data center and cloud computing security company. Organizations such as Morgan Stanley, BNP Paribas, Salesforce, and Oracle NetSuite use Illumio to reduce cyber risk, protect the crown jewel applications, achieve regulatory compliance, securely migrate applications to the cloud, and to overcome all sorts of other data center and cloud security challenges. Illumio is privately held and headquartered in Sunnyvale, California. The company was founded in 2013.

Project Scope and Improving Current Processes

Illumio's main goal and desire from this effort was to improve current processes. Each requirement was meticulously described and articulated by the Illumio Sales Ops and IT teams, with current and future growth in mind. Not only did Illumio want this to be a robust and proactive solution, but they also wanted to ensure this system could sustain rapid future growth. As a company that is rapidly expanding, Illumio always has its eyes set on the future; its CRM system needs to reflect that.

Preparing a Business Solution for Future Growth

Illumio is a fast-growing company that wanted to optimize its sales process. Illumio needed the ability to provide pricing options to its customers, in a manner that accommodated Illumio's rapid growth. They required an implementation from a partner who could ensure these needs were met. Optimization needed to occur at a swift, yet effective pace.

The Solution: Salesforce.com Sales Cloud Optimization and SteelBrick CPQ Implementation

Jade Global analyzed Illumio's existing business processes and designed/architected solutions for various processes for CPQ and the Sales Cloud re-implementation. Jade offered a unique deployment strategy by using the ANT migration tool in Salesforce.

- Configuring desired products from all products in system is time consuming
- Opportunity forecasting and capturing ACV on opportunity not automated
- No clear differentiation between renewal opportunity and upsell opportunity
- Approval processes needed to be more dynamic in order to accommodate rapid growth
- Discount approvals did not have a clear definition
- Product configuration and pricing tiers were too simple for the Illumio sales process

Preparations Involved the Solution

Preparations for the new SFDC ecosystem included:

- Training all Illumio sales reps “hands on” for opportunity and quote creation and management
- Management training on the quote approval process
- 3 available co-term methodologies
- Enhanced quote management and output capabilities
 - Automated PS, Training and T&E inclusion of a prospect
 - Existing VEN counts automatically incorporated in EXP quote pricing
 - 3 different discounting methods
 - Quote document subscription display options of annual buckets or as a single group (three 1-year groups or a single 36-month group)
 - Determine whether to display list prices
 - Determine whether to display UF discount
 - Automated Terms & Conditions language based on standard or non-standard quotes
 - Automated quote approval routing and tracking integrated with Outlook
 - Automated Renewal opportunity and quote creation 4 months in advance of a contract end date

The complete solution is outlined below:

Sales Cloud Implementation

- Role hierarchy and territory hierarchy management is implemented based on regions
- Account Master Implementation – Business is keen to maintain one account for all customer types i.e., end customer, partner, distributor & service provider instead of creating multiple accounts
- Opportunity Optimization
- Salesforce Lightning Experience
- Advanced Approval

SteelBrick CPQ Implementation

As a SteelBrick CPQ customization partner, Jade Global helped Illumio with the following processes:

- Contract Creation and Management
 - After introduction of the product, Illumio was able to create contracts for base products and attach supporting products to the same contract
- Subscription Creations and Subscription Renewals
 - Jade Global helped integrate with Illumio’s external system for subscription provisioning and attached renewal subscriptions to renewed contracts
- Transition Business from Legacy to New System
 - Transitioning of legacy products, pricing and quoting with new AppExchange product customizations provided by SteelBrick
 - Advanced approval process implementation
 - Territory management for creation of quotes

Address Production Org. Challenges

Jade helped Illumio manage its legacy products, quoting process, existing production customizations, and provided Salesforce best practices for maintaining the system. This reduced burden on sales reps to configure quotes and increased performance. Territory management helped make the sales operation process easier by providing relevant opportunity data with respect to territories.

Address Deployment Challenges

Territory management at Illumio was configured and now acts as a backbone for approvals. Although verification of approval flow and approval email templates was challenging, Jade used the ANT Migration Tool in Salesforce for deployment production to manage products, price rules, and set up approval chains.

The Benefits

- Simplified process of renewal opportunity management
- Efficient and precise communication between Illumio and its clients
- Quoting capacity increased from 2 to 30 + people
- Automated quote approval routing and tracking integrated with Outlook
- Quote document subscription display options of annual buckets or as a single group (three 1- year groups or a single 36-month group)
- Account master implementation reduces duplicate account data for customers in the system
- Discounts automation helps sales reps gain business and close quotations with less hassle time
- Existing VEN counts automatically incorporated in EXP quote pricing
- 3 different discounting methods
- 3 available co-term methodologies
- Automated Terms & Conditions language based on a standard or non-standard quote
- Automated PS, training and T&E inclusion of a prospect
- Role hierarchy implementation

Business Benefits and Results

The Salesforce.com Sales Cloud Optimization and SteelBrick CPQ Implementation has enabled Illumio to utilize a system that has the efficiency and precision to match its rapid growth. Illumio's new Salesforce system is easy to maintain and allows for efficient and precise communication between Illumio and its clients.

The key differences Illumio users experienced as part of the solution were the new sales territory structure, and that sales reps could create and manage their own quotes. Territory management account sharing enables Illumio to manage accounts efficiently by structuring Salesforce data the same way sales territories are structured.

The new automated quote approval flow process integrated with Outlook gives visibility and reduced timelines to get a quote approved. The automated renewal opportunity and quote creation process is made 4 months in advance of a contract end date. As a result, Illumio increased its quoting capacity from 2 to 30+ people and is now **experiencing true global coverage.**

About Jade Global

Jade Global provides enterprise business application implementations, integrations, software product engineering, Cloud services, technology advisory, testing, and managed services across diverse industries. We are headquartered in San Jose, California with U.S. offices in Philadelphia and Los Angeles. Jade Global is an Oracle Platinum Cloud Select partner, Salesforce Silver Partner, ServiceNow Silver partner, Dell Boomi Certified System Integrator Partner and Microsoft Gold partner. We have additional strategic partnerships with NetSuite and Zuora. Jade has been recognized as one of the fastest-growing companies in North America by Inc. 5000 and was featured on the Fastest Growing Private Companies list in the Silicon Valley Business Journal.

www.jadeglobal.com | info@jadeglobal.com | 877-523-3448

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