

Client

An Australian telecommunication leader which actively uses Salesforce.

Solution

Salesforce, Vlocity Communications Cloud, Industries CPQ, billing system, in-house field management software

Industry

Telecommunications

Challenge

The client asked for an industry-specific cloud-based solution to support the rapid growth of the customers, furthermore to streamline and unify internal business processes related to the quoting process & order management. The challenge was about having a new solution integrated with 3rd party software. The client currently uses it to provide a single source of truth. According to the client's requirements, the Routine Automation team as a Vlocity Partner suggested Vlocity Communications Cloud as an effective solution. Vlocity is known for its industry-specific solutions. To date, Vlocity is focused on the communications industry, where the Service Agent can quickly build orders and quotes and can close sales rapidly.

Solutions

The RA team configured and customized VLOCITY COMMUNICATIONS CLOUD to meet customer needs and requirements.

The client noticed that the sales team was taking a much longer time to close sales. The sales team uses traditional methods; spending too much time filling out Excel sheets to track pricing, quoting, and products; and a manual approval process for customer discounts. It has become a mess. That's why the client needs a solution that helps the sales team manage the sales process and close the deal faster. Here comes INDUSTRIES (VLOCITY) CPQ to streamline sales processes. It provides DOCUMENT TEMPLATES for creating documents and quotes, an ENTERPRISE PRODUCT CATALOG (EPC) to configure and manage CPQ in one place, etc.

SELF-SERVICE COMMUNITY was built to provide a seamless experience for the end customers.

RA experts also set up an ENTERPRISE PRODUCT CATALOG (EPC) in order to provide a unified interface for different groups of users; eligibility and compatibility rules to control which product can be available for purchase; a custom product hierarchy was created based on the customer's current offerings.

CONTRACT LIFECYCLE MANAGEMENT (CLM) was created to support document generation and signing of custom document templates.

OMNISCRIPTS were widely used for both internal Salesforce Lightning users as well as for a customer portal to provide easy and clear step-by-step setup processes. For example, an OmniScript for the customer support team to collect data for equipment installation and/or maintenance the request from a customer.

Finally, to separate products available for different territories (states), ELIGIBILITY RULES and CORRESPONDING PRICE LISTS were set up by our team.

Results

- **Vlocity implementation**

Was successfully integrated into the client's current network including a community portal, third-party billing system, and other custom solutions to streamline the work of the internal managers by using a unified interface for product & subscription management.

- **Workload optimization**

Reduced managers' workload by automating time-consuming daily operations and providing them with a clear overview of the ongoing & upcoming tasks.

- **Increased employees' productivity**

Salesforce implementation allowed our client to redistribute their time and concentrate on higher priority tasks like further business expansion rather than on daily routine.

"Routine Automation's work pleases their client immensely. Their team's quality is high calibre and on par with onshore development partners. When any potential issues arise, they're addressed quickly and professionally. Routine Automation offers seasoned resources to foster client success. "



Janusz Majewski
Sales & Delivery Operations Manager



PolSource