

Industry: High Tech

Application: Revenue Cloud , CPQ

Creating a Faster Quoting Process with CPQ

Since 1997, Devada has connected developers and tech professionals through their online communities Dzone and AnswerHub. These platforms help developers grow and collaborate across the globe.

The Challenge:

- Team faced TWO unsuccessful launches with other Salesforce consultants prior to working with Cloud Giants.
- Users were frustrated and lost faith in the system as a result.
- The quoting process was inefficient w/ all approvals requiring manual review from management.
- Reps were unable to capture upsell and cross-sell opportunities.
- Delivery didn't have the clarity it needed to execute the work at a high level despite having the knowledge and expertise needed.
- Finance lacked clarity on what and when to bill customers.

The Solution:

- Reimplemented CPQ with multi-phase approach that prioritized the most immediate needs while creating quick victories.
- Identified power users to involve from the start to encourage user input and adoption.
- Implemented dynamic pricing and bundled discounts.
- Implemented more automated approval process for management.
- Implemented DocuSign integration for e-signature.

Benefits:

- Restored faith in the system driving user adoption.
- Improved and simplified the quoting experience by cutting SKU list from hundreds to <30 and reduced products by >50.
- 98% of quotes are now auto-approved, significantly reducing quote turnaround times.



"[Your consultants] do a great job internally of sharing resources and knowledge. It's great to know that our consultant isn't an island; they have people to go back to for working through challenges."

-Matt Web, Chief Financial Officer