

Industry: Life Sciences Manufacturing
Application: CPQ

CPQ + Automation Speeds Order Creation by >90%

The right animal model holds endless possibilities for drug discovery and advancements in human health. Our client provides research organizations with the best animal model solutions to drive critical research from idea to cure.

The Challenge:

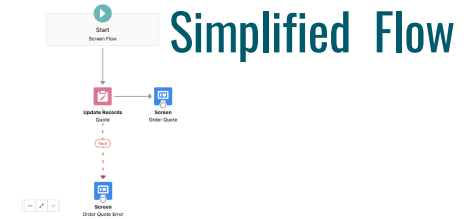
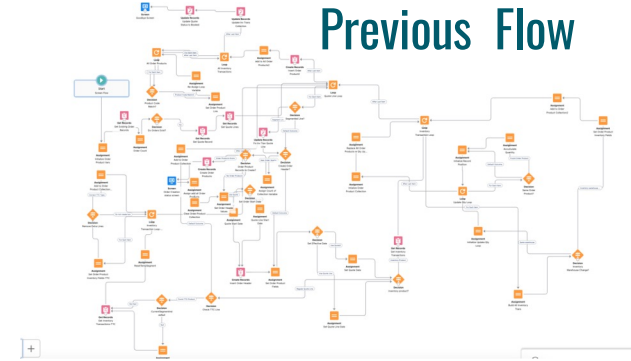
- An aging CPQ installation with outdated automation prevented our client from creating standing orders efficiently.
- Reps spent hours creating opportunities and quotes to generate each order, with each standing order representing up to 52 repeated orders per year.

The Solution:

- Cloud Giants leveraged standard CPQ functionality in conjunction with automation.
- Leveraged Quote Line Groups for quote creation and ordering.
- Developed a standard quote template, simplifying order information capture.
- Used CPQ for the “heavy lifting” of automatically generating orders, then leveraged Salesforce Flows for post-order “clean up,” updating additional fields from a custom object used for Netsuite integration.

Benefits:

- Quote creation for standing orders reduced cycle time from 3+ hours to under 15 minutes, creating a much improved user experience.
- Quote errors were reduced through order cloning, retaining all information for each order within one quote.
- Simplified opportunity and quote reporting, making it easier to glean insights..
- Improved ability to push orders to Netsuite, client’s ERP system.
- Reduced technical debt even with additional customization.



“Cloud Giants worked with our team to create an order entry solution in Salesforce CPQ that...elegantly handles highly variable product and delivery considerations. [The solution] is saving us time and supplying the customer with a complete quote. We are seeing on average a 40% savings in entry time in these situations. This is a significant win.”

-Renée Butcher; Training & Instructional Design, Taconic Biosciences, Inc.