

Rescuing Rhombus's Systems's CPQ Implementation



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Intro

Rhombus is a hardware and software company focused on providing businesses with security solutions in the physical world. While the company operates in many ways similar to a typical SaaS business, the hardware aspect of the business model requires a slightly different approach than a pure software company. Additionally, Rhombus's business model relies on their Channel Partnerships teams and various resellers, which adds further complexity to price rules and the workflows followed by Account Executives.

Rhombus made the decision to purchase CPQ in the summer of 2022 to address their sophisticated quoting and partner selling motion. Unfortunately, the initial implementation fell short of expectations, leading the company to struggle with poor or incomplete processes, low user adoption, and productivity setbacks.

When Dominic Stevenson came into his new role at Rhombus as a Sales Operations Manager, he quickly identified that their CPQ setup was not meeting the needs of the business and decided to bring in a specialist consulting firm. In leveraging Candybox's expertise and experience, Rhombus was able to re-implement a core set of business processes in just a few months.

Initial CPQ Implementation

The initial CPQ implementation was implemented by another consulting firm. However, core business use cases were not addressed and documentation was minimal. Dominic shared Rhombus's initial experience, stating:

"When we launched, we should have done more testing in a subgroup of users and gotten their feedback, as opposed to launching for all users and saying 'hey, take it from here. You're on your

own.' They were thrown into the deep end with little enablement or training. They were introduced to a process that was completely different from what they were used to."

With any poor implementation, you will struggle balancing the need to create temporary bandaids for your common use cases, while also trying to create scalable solutions for the long-term. Good RevOps consultants can identify immediate solutions to pressing business problems, while also thinking through long-term architectural implications.

The Account Management team at Rhombus also encountered difficulties with the CPQ implementation for their workflows. Some Account Managers work with specific partners who have their own unique pricing rules and fundamentally different sales processes. However, these considerations were not taken into account during the initial launch, which meant that reps working with these partners could not generate quotes or easily close Opportunities.

Rhombus was looking for someone to solve and implement functionality for their most common use cases.

CPQ Fixes

Post-implementation, Rhombus set up a dedicated Slack Channel to provide admin support to reps. Initially, an admin's assistance was necessary for reps to address any issues related to quotes. As Dominic explained, "On launch [of CPQ] I was absolutely slammed."

Candybox helped implement or fix a collection of processes unique to CPQ such as quoting unique to their partners, free trials, automating shipping costs for particular products in quotes, and one of the core CPQ offerings: Product Bundling.

Candybox addressed one of the core issues for a particular partner by creating an exception in the approval conditions to exempt this partner from the approval process. This change eliminated a backlog of unnecessary and time-consuming approvals.

Additional price rules to fully discount shipping costs automatically were also implemented, preventing Quotes being sent with incorrect pricing.

Non-CPQ Initiatives

In addition to addressing these use cases within CPQ, Candybox was also able to help streamline their Partner Deal Registration process and lead assignment. We set up the following process:

1. Partner submits a Lead via the Rhombus Partner Portal (built on Impartner)
2. Based on a variety of factors such as location, # of employees and industry, that lead would get routed to the correct Account Executive automatically
3. Additionally, a notification would be sent to the Account Executive alerting them immediately of the Deal Registration.

This was a huge time-saver for the Channel Team. Previously, they would initiate an email chain with the Partner, where they would cc in Account Executives, hoping to get the correct rep onto the thread. Rhombus is a Channel first business, meaning that this workflow impacted a large percentage of their new revenue.

The technical base of this build was originally for routing leads to Rhombus's Business Development Representatives. Over time, new functionality was implemented to allow Paid Time Off (PTO) to be scheduled for end users, ensuring that leads weren't routed to individuals who were unavailable.

Business Impact

When asking Dominic what overall impact Candybox had on the business, he outlined these three areas:

1. **Knowledge:** "I'm able to do my job more efficiently. That had a huge impact on me personally and professionally."
2. Reps being more **efficient** with the sales process; anywhere from converting Leads, generating Opportunities, and building complex Quotes. They have fewer barriers now and can do everything faster, which has a direct impact on business performance.
3. **Specialization** of different skill sets that Rhombus was able to leverage for a variety of projects.

As Dominic originally explained, with a poor implementation there is a series of direct and indirect impacts on the ability for the business to generate revenue. With Candybox's help addressing these issues, now Rhombus has:

- a) Reps are able to build out Opportunities and Quotes in a timely manner for its customers
- b) Reps are less burdened by time-consuming Salesforce processes
- c) Sales Operations is able to better devote its time on long-term, high impact projects

Candybox Differentiator

We asked Dominic about the additional ways that Candybox was able to help:

“If I were to say what the differentiator is for Candybox, it would be number one that you’re extremely knowledgeable; that’s very important because you want to have a resource that you can tap into that actually knows something that you don’t. We’re trying to come to you to address a problem.

The second differentiator is the customer experience. Brent is an active listener. He’s trying to give you the time of day to honestly hear you out, and trying to help you come up with a creative solution to it.”

Finally, we really appreciate Candybox’s transparency: “I would ask if you know xyz. And sometimes the consultant we were working with would be completely honest and say “I don’t have experience doing that, but I will find out for you.” And I respect that as opposed to someone lying and then getting exposed.”

Finally, we asked Dominic to share any advice he would have to someone else looking into evaluating a consultant to bring on. The two primary factors he mentioned were:

1. ***Response time*** is very important. How likely are they to respond when you need swift assistance?
2. ***Big Picture thinking***: Have they considered any unintended consequences? Anytime someone can provide insight on “you’ve thought about *abc*, but have you thought about *xyz*?” is extremely valuable

What’s next for Rhombus? Now that the foundational work has been addressed, the team is prepared to focus on long-term strategic initiatives, while being much more self-sufficient in their day to day operations. *If you are a Sales or Revenue Operations professional, you want to be focused on the future and moving the business forward, as opposed to cleaning up problems from the past.*