

CDW SUCCESS STORY

TAKING THE POWER OF TECHNOLOGY AND MAKING IT WORK FOR YOU.

PUBLIC STATE UNIVERSITY

SALES DIVISION: Hi-Ed

QUARTER AND YEAR OF SALE: Q4 2023

LOCATION: Kentucky

TOTAL SOLUTION DEAL SIZE: \$250K – \$500K

SOLUTION: Digital Velocity, Salesforce

ACCOUNT TEAM: Ken Parton (Advanced Technology AE), Bryan McCleery (Sr. Solutions Architect – CRM Consulting), Justin O'Brien (Account Manager)

BUSINESS CHALLENGE

The customer faced a challenge due to the lack of interconnectivity between their various systems and tools. This resulted in data silos, preventing the enterprise from attaining a comprehensive view necessary for coordination and collaboration with shared partners and other key stakeholders.

CUSTOMER PRIORITIES

The customer wanted to implement a foundational Salesforce CRM and engagement solution to enhance visibility, streamline operations, and encourage cross-team collaboration with industry or corporate partners for their B2B relationships.

SOLUTIONS IMPLEMENTED

Our strategic partner, Coastal Cloud, initiated conversations with the Office of Research and Innovation (ORI) at the University. After discussing the project with Coastal Cloud, CDW was brought in as we held the E&I contract. The Kentucky E&I contract, accepted by the University, allows for fast rubber stamp approval and removes the need for RFP or Bid process for all engagements. CDW is one of three VARs with this contract. This contract was the missing piece of the puzzle, and the deal couldn't be closed without it. We started working on the project in May and successfully closed the deal by October.

CDW leveraged Coastal Cloud to deliver these services to the customer:

- Salesforce CRM foundation implementation
- Salesforce marketing cloud foundations implementation
- Managed Support Services (up to 6 months)

CUSTOMER OUTCOME

The project has just started, with a strong trajectory towards achieving innovation, experience, and agility outcomes. With a more comprehensive view of their data, the customer's Office of Research and Innovation (ORI) will be able to coordinate and collaborate with programs that share corporate partners and other key stakeholders.

As part of the project, CDW had the opportunity to meet with the CIO, CISO, and Director of Infrastructure Services. Currently, we are in the initial stages of discussing a Firewall refresh, and the replacement of Isilon and Hyperflex.

STEPS THAT CLOSED THE DEAL

CDW became involved in this deal through account planning with CDW Digital Velocity Salesforce Practice and Coastal Cloud. This involved collaboratively identifying targets and working through the research to craft sales plays for initial solutions. CDW holds the Kentucky Higher Education E&I contract, which the University prefers, and enables swift and seamless execution of professional services engagements. Coastal Cloud led the technical scoping and delivery aspects of the project, while CDW was responsible for coordinating the creation of the Statement of Work (SOW), explaining the services allowed on the E&I contract, and ensuring a seamless signature process for the customer. CDW's sales team continued to work closely with Coastal Cloud and different stakeholders, including the CIO and CFO, to ensure all required items were in place for final customer approval and signature.

The CDW team was in daily contact with the customer leading up to the final signature to ensure all necessary items were in place. The budget requirements were met, the E&I contract vehicle was expressly listed in all documents, and future project roadmaps were established. This was the first professional services engagement with the customer, and Ken Parton (Advanced Technology AE) was in close contact with their procurement office, explaining the CDW services process and expectations for Statement of Work-based engagements. Overall, the E&I contract and customer experience set CDW apart from the competition.



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