urac

& ITequality

Location - Washington DC
Employees - 100+
Industry - Nonprofit / Medical
Solution - CPQ Managed Services

01

In it for the long Haul.

URAC is a 30 year old nonprofit organization that provides accreditation for health industry providers. Since 2017, they have been with **ITequality** and using CPQ in order to provide quotes to the various health organizations seeking their accreditation. The quoting process involves multiple locations and different aspects of service in order to quote various interrelated certifications.

For 6 years and counting, **ITequality** managed services has helped pave the way for Salesforce success.

"Ashley and her team met all our needs. (**ITequality**) is patient and takes the time to transfer knowledge to our internal team so that we can become more self-reliant. I cannot recommend this team highly enough!"

- Maggie Cornett, Chief Information Officer - URAC

urac®

Helping save
lives since 1990

ITequality

The Challenge

We first met after Ashley had presented on the topic of CPQ at Dreamforce 2017. We met up at a nearby diner and sat down with Maggie from URAC, and she said to us, **"We don't know how to make any new products inside CPQ"**. They had a CPQ implementation that left them without any documentation or ability to maintain the solution they had paid for.

URAC's system administrators at the time had limited prior knowledge of Salesforce. Many of them were "Accidental Admin's" if you will. The wide variety of custom products URAC offers sometimes changes, requiring unique products to be added and removed with precision. The system administrators did not have a go-to resource for advanced technical questions.

Key Players:

- ◇ **Maggie Cornett**, CIO
- ◇ **Matthew Marshall**, System Administrator

03

The Solution

Working alongside **ITequality** has provided URAC with the ability for their new admins to skill up quickly and learn from experts. **ITequality** is able to leverage our talented consultants to provide best practice advice across the platform.

Educate

in house administrators to archive old products.

Architect

new products and configure them together, so URAC administrators can support the new products.

Document

Salesforce in order to provide the team with a blueprint of the existing system architecture.

04

The Results

Customer Longevity

URAC has trusted us with their Salesforce needs since 2017. We have enjoyed helping this client become more self-sufficient, which gives us more time to handle new things that come up like e-signature, templates and permissions.

Salesforce and the client needs may change over time - but our consistent service does not change. We work with our clients to ensure that we are meeting their needs at all stages.

ITequality

- Founded in 2017
- 140+ Projects Completed
- Registered Consulting Partner

Diverse Supplier

- Certified LGBT-BE
- Woman Owned Business
- Economically Disadvantaged Business
- Small Business

We Specialize in: <u>Revenue, Sales & Experience</u> Cloud:

- Implementations
- Managed Services
- Enhancements

We are your trusted partner for:

- Flexible terms
- Year over year managed services
- Turning Around Red Accounts

ITequality

Thank you!

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