



CUSTOMER SUCCESS STORY



## Weave

Weave combines all your communication streams from your PMS to your mobile device and business phone, into a single simple tool. One that creates more productive and meaningful conversations by serving up relevant patient details during every patient interaction.

**Headquarters** Lehi, UT, USA

**Industry** Communication

**Website** [www.getweave.com](http://www.getweave.com)

**Services**



Development



Consulting



Implementation

## The Challenge

“ The issue we were facing is that we were limited in functionality, features and long-term stability using Salesforce’s native quoting functionality. There were a lot of custom workarounds that had grown unstable. And there were additional areas that we wanted to expand, but weren’t able to. That’s what drove us to look at CPO solutions.

- **Jaymee Parsons** *Weave Salesforce Admin*

The team at Weave faced two main challenges:

**Lack of Quoting Control** Weave struggled to adequately control the quoting process, including creating safeguards to secure and streamline the quoting process. They determined that SteelBrick was the correct solution for their needs.

**Short Timeframe** Weave needed the entire SteelBrick implementation completed in a short 6 week timeline.

## The Solution

“ The biggest thing for us is visibility into what is actually being sold. Our previous system offered little visibility into the hardware and plans that were being sold. That was a huge headache for our customer success team. It was difficult for them to accurately represent their accounts. As of right now, that is the biggest thing we have gained.

- **Jaymee Parsons** *Weave Salesforce Admin*

- Product Bundles** Weave employees are now able to select and adjust product bundles for creating quotes for customers.
- Custom Pricing** Block pricing, partner discounts, and discretionary discounts were created and implemented.
- DocuSign** DocuSign for SteelBrick was configured to allow for signed approvals.
- Recurring Packages** Subscription packages were created for the different monthly and yearly recurring packages.
- Workflow Rules** Custom workflow rules were created and configured for required business processes.

## The Results

“ I don't give out the high scores very often, but the way this was scoped compared to where we are now is almost perfect. . . Communication from the team was frequent and handled well. Before Simplus, we were using an old system that was fine for reps but ineffective for the company, Salesforce is the best option for us. The value we're going to get from this product is huge. Would definitely recommend!

- **Jaymee Parsons** *Weave Salesforce Admin*

The streamlined quoting process has reduced incorrect pricing, reduced errors in customer accounts, and increased customer satisfaction for the customer success team.