



CASE STUDY

CPQ

Implementation



CPQ Implementation

Challenge:

A Telecommunications customer had hired a Salesforce consulting partner to do their CPQ Implementation and the project was not making any forward progress so they reached out to MC4 Solutions to move the project to completion.

Solution:

MC4 Solutions initiated requirements gathering meetings to understand the company's product offerings. Through several product meetings, we identified the necessary bundles based on various criteria and discussed the discount levels to be considered in the calculations. After defining the product bundles, product rules, and discounting structures, we focused on how quotes should be presented and distributed to customers. It was determined that integrating both DocuSign and Conga Composer into Salesforce was essential for a complete solution.

MC4 Solutions designed and developed a solution enabling the Sales Team to generate a quote, convert it to PDF, and send it via DocuSign. Once the signing process was completed, the signed quote was uploaded into Salesforce, and records were updated and created based on the information collected during the DocuSign process.

Outcome:

CPQ was launched company wide during the rest of the Salesforce Implementation. In addition to the launch of CPQ, MC4 Solutions provided end user training and post go live support.

One of the challenges we had during the project was the customer faced difficulties in defining the scope of the CPQ implementation, particularly in deciding whether to opt for a greenfield approach or to load historical quotes. Additionally, they struggled with wanting to build for every possible scenario rather than applying the 80/20 rule to focus on the most common and impactful cases.

Solution:

1. Scope Definition:

- **Challenge:** Ambiguity in whether to implement a greenfield approach or incorporate historical quotes.
- **Solution:** Conducted thorough discussions with the client to understand their business needs and goals. Provided a detailed analysis of the pros and cons of both approaches. Guided them to make an informed decision based on their long-term objectives and immediate requirements, ultimately deciding on the approach that best suited their operational needs.

2. Efficient Implementation:

- Challenge: The client wanted to build solutions for every possible scenario, which risked overcomplicating the implementation.
- Solution: Introduced the 80/20 rule to the client, emphasizing the importance of focusing on the most frequent and impactful scenarios. This approach ensured that the implementation remained manageable and efficient. By prioritizing the key functionalities, the client could achieve a robust and scalable CPQ system without getting bogged down by rare exceptions.

These 5 takeaways highlight key aspects of successful CPQ implementation, emphasizing the importance of thorough planning, integration, automation, and support.

Thorough Requirements Gathering:

- Detailed requirements gathering and a deep understanding of product offerings are critical for defining accurate product bundles, rules, and discount structures.

Analysis:

- Break the project into manageable releases to ensure continuous progress.
- Encourage the client to maintain a focus on the overarching goals.
- Apply the 80/20 rule: prioritize key functionalities rather than accommodating every possible scenario.

Integration of Key Tools:

- Integrating tools like DocuSign and Conga Composer into Salesforce can streamline the quote generation and distribution process, enhancing efficiency and accuracy

Automation Enhances Efficiency:

- Automating the conversion of quotes to PDFs and the DocuSign process, along with automatic updates in Salesforce, improves operational efficiency and reduces manual errors.

Collaboration and Communication:

- Regular communication and collaboration with the client during the project are essential for understanding needs and ensuring successful outcomes.



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