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Overclocking efficiency with Salesforce CPQ for 20% quicker quotes and 75% fewer ordering errors

Transforming sales operations for a leading US hospitality solutions provider to achieve a 15% increase in new acquisitions.

Empowering thousands of restaurants across the US with its innovative all-in-one platform, this organization is one of the largest solutions providers in the US hospitality market. It offers a wide range of products to seamlessly connect customers, employees, suppliers, and operations through its reliable and easy-to-use platform.

The organization has used Salesforce for its sales and service operations for over a decade, with extensive customizations to achieve the desired functionality. However, these customizations hindered its ability to respond to market changes with agility, limiting the sales team's capability to configure deals while maintaining a rule-based model for consistency and profitability.

Although the company was a leader in the SMB restaurant segment, it lagged in the large and multi-location chains segment. To enable multi-location capabilities, sales processes need to be simplified, and an account hierarchy model within Salesforce needs to be built to support MLM capabilities.

To address these challenges and embark on a sales transformation journey, the organization decided to implement Salesforce CPQ (Configure-Price-Quote). As a leader in delivering advanced technical solutions and services on the Salesforce platform, including Salesforce CPQ, Brillio emerged as the ideal partner.

Four-Phase Blueprint for Salesforce CPQ Implementation

The initial phase focused on process overhauling. Brillio implemented Salesforce CPQ for all new business intakes, significantly simplifying processes and laying a strong foundation for the transformation of sales operations.

The second phase involved replacing the legacy custom-built processes for amending existing orders with the amendment processes from Salesforce CPQ. This ensured a seamless user experience for order amendments and enabled a complete migration to Salesforce CPQ for all sales processes.

In phase three, profitability was addressed, with the aim of improvement by implementing usage-based pricing (UBP).

The fourth phase focused on building an account hierarchy within Salesforce to enhance multi-location capabilities for larger customers. Following an agile methodology, at least two production releases were achieved monthly. Additionally, Brillio helped implement a new product bundling structure and continued to address billing issues.

The implementation was executed across four distinct phases, each with a specific goal and timeline.

Step-by-step Solution Design

POC Stage: In this phase, Brillio would conduct thorough discovery sessions with key stakeholders to understand their current manual quoting processes, contracting and amendment procedures, pain points, and specific requirements. Proof of concepts were created to demonstrate potential improvements, securing stakeholder approval for the subsequent build phase.

Build Phase: The complete solutions were developed using Agile Development models with two-week sprints. Prior to sprint planning, Brillio architects would collaborate with the client's stakeholders to refine and prioritize the backlog of features and enhancements. During sprint planning, solution stories from the backlog were selected and pulled into the sprint based on capacity. Once a sprint began, stories were assigned to developers for implementation in the development environment, followed by validation in the System Integration Testing (SIT) environment by QA engineers. After successful SIT validation, the stories were deployed to the User Acceptance Testing environment (UAT) for stakeholder sign-off. The stories were marked for release upon receiving stakeholder approval and deployed to production during the planned go-live or as part of the next scheduled deployment.

For each subsequent phase of the implentation, Brillio proposed a two-step approach: the POC stage and the Build stage.

Reducing Quote Generation and Approval Time by 20%

Following the implementation, the sales user experience was enhanced, enabling sales users to close deals more efficiently using Salesforce CPQ compared to the old custom-built quoting process.

Additionally, errors in manual entries were significantly reduced due to the implementation of well-designed product bundling, product rules, price rules, and smart approvals.

After implementing the Salesforce CPQ-driven amendment process, the process for upselling and downwelling in existing orders became seamless and user-friendly for sales users.

The implementation of Salesforce CPQ reduced quote generation and approval time by 20%, allowing sales users to close deals more efficiently. This efficiency was a significant improvement over the old custom-built quoting process. Furthermore, the enhancements contributed to a 15% increase in new customer acquisitions and white glove onboarding, reflecting the improved user experience and streamlined processes.

Immediately after implementing the new order service, a remarkable 75% reduction in order creation errors was observed. In the subsequent weeks, these errors were eliminated, showcasing the new system's robustness and reliability.

Additionally, Brillio's efforts were instrumental in recovering $14 million in revenue that had been either unbilled or underbilled as part of an organizational initiative to arrest revenue leakage due to gaps in systems and processes.

20% Reduction in Quote Generation and Approval Time

15% Increase in New Customer Acquisitions and White Glove Onboarding

4x Improvement in Order Creation Accuracy

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ABOUT BRILLIO

Brillio is one of the fastest growing digital technology service providers and the partner of choice for many Fortune 1000 companies seeking to turn disruption into a competitive advantage through innovative digital adoption. We help clients harness the transformative potential of the four superpowers of technology: cloud computing, Internet of Things (IoT), artificial intelligence (AI) and mobility. Born digital in 2014, we apply our expertise in customer experience solutions, data analytics and AI, digital infrastructure and security, and platform and product engineering to help clients quickly innovate for growth, create digital products, build service platforms, and drive smarter, data-driven performance. With 17 locations across the U.S., the UK, Romania, Canada, Mexico, and India, our growing global workforce of nearly 6,000 Brillians blends the latest technology and design thinking with digital fluency to solve complex business problems and drive competitive differentiation for our clients. Brillio has been certified by Great Place to Work since 2021.

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