

Bouncing back from an unsuccessful CPQ implementation, with increased productivity and business alignment

Client:

A leading provider of software solutions to support three main activities: perfecting customer experience, powering public safety and financial crime prevention and compliance. In order to deliver a full Quote to Delivery (Q2D) experience we were approached to deliver their CPQ and provide an adoption plan.

Our role:

Due to the challenges with the existing CPQ both in terms of usability and therefore also adoption, we reimplemented Salesforce CPQ. With a focus user-friendliness and logical alignment to the processes and functions of the business.

Solution:

Our solutions took to simplify data entry through improved layouts and enhanced pricing calculations. We re-developed VP pages in their quote line editor. Further, we drove the standardization of business processes for maintenance and discount calculation activities. We supplemented this with a revision of pricing and product rules, and automated price calculations.

This alone was not enough, when considering that prior to our entry there was an aversion to using the new tool. Digital adoption efforts were critical to turn perceptions around. Because even though the tools greatly uplifted the user's experience and could simplify their work, it was different to what they previously had and thus would require some virtual hand-holding to reduce initial fears or concerns at first exposure.

We used WalkMe and combined best practices of adoption. Creating a guided walkthrough for Quote creation and also highlighted key elements in the process for users that want to be more in control of their experience.

The results were a successful user uptake of the improved tool. With the main wins being less time spent on staff training, improved data quality due to reduced data entry errors and increased productivity. As processes were more intuitive and calibrated to this client's Q2D process.

"PwC took part in this project with the implementation and had a significant contribution to the project success. Thank you"