



CNET
GLOBAL SOLUTIONS

Take Complete Control over Sales Process and Billing - Learn How Our Customer Did It?



**Streamline the Configure, Price, Quote (CPQ) with Billing
for better pricing and order processes!**

Customer overview

The Customer, a well-known provider of commodities, energy information, and price assessment in the commodities markets, wanted a solution that will help them streamline the sales and billing processes. of remembering credentials for individual applications but also improves user productivity by eliminating frequent helpdesk calls associated with passwords concerns.

Customer

Financial Information
& Analytics

Location

New York

Industry

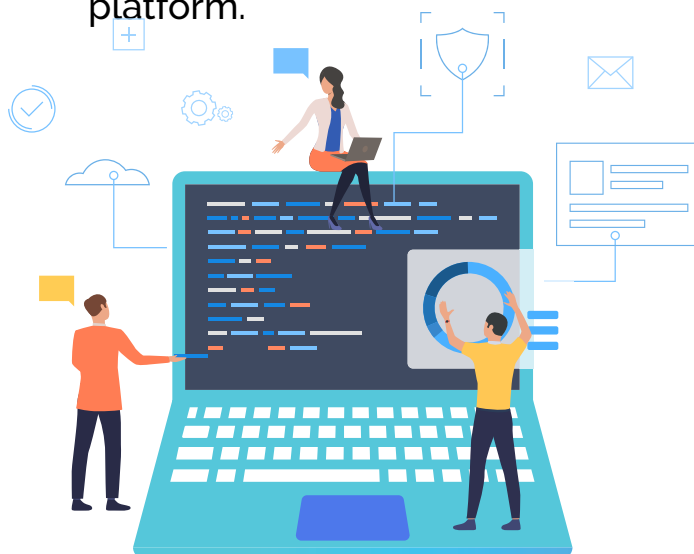
Energy

Customer profile

The customer is a provider of commodities, energy information, and price assessment in the physical commodity markets. With the quick turnaround and response time requirement, the customer wanted to streamline its Configure, Price, Quote (CPQ) processes.

They were using an old legacy system that would have to depend on multiple platforms that posed standardization uses.

Given the nature of the competitive commodities, energy information, and price assessment market, the customer needs to be on-time with their sales and billing processes. They wanted help to automate their CPQ model on the Salesforce platform.



BUSINESS REQUIREMENT

Streamline Sales and Billing Processes

When they approached us, the customer had a legacy system that used multiple systems and platforms. As a result, it was difficult to have complete control of the sales and billing processes. Team members struggled to understand the business flows. They wanted CNET to fully comprehend their business operations and customize Salesforce accordingly.

Standardize Order and Billing System

The customer was using multiple order and billing systems to complete their sales cycle and implement their billing processes. Therefore, they faced a lot of errors during the process, and the lack of standardization resulted in delays.

Optimize the Quote and Order Process

The biggest challenge of optimizing the quote and order process was not only to configure CPQ as per the unique needs of the business but also to customize the CPQ. Alongside this, we had to also optimize the quote and order process so that the end-users found it easy to adapt and use.



SUGGESTED SOLUTION

The CNET Approach

At CNET, we believe that each customer has unique requirements, and that is why our team takes the time to understand the problem before tailoring a solution that suits our customer's needs.

The Team

We have a team of Salesforce consultants who have extensive experience and deep expertise in Salesforce. They have dealt with end-to-end implementations for different customers after studying and understanding their business flow and processes.

The Process

Our team of Salesforce consultants started working with the customer's team. They collaboratively went through the current processes to define how they operate currently. As a next step, our team went on to identify, design, develop, and implement a solution that streamlines CPQ processes and worked best for the customer's team.

Configure Vital Data

Our team worked on understanding the various aspects of the business, which included CPQ Products, Price Books, Product Catalogs, Price Rules, and Discount Rules. We had to first ensure that all the vital data was updated to enable users to work on the improved system with ease.

Streamline Crucial Processes

In most companies, certain processes take a lot of painstaking detail gathering and verification. Often, these are the processes that also result in ensuring continued income. For our customer, it was the automation of the entire subscription billing process to ensure that recurring billing and revenue management is more straightforward.

CHALLENGES

Some of the challenges that our team faced included the following:

Data Migration

Since the customer was operating on legacy systems that were not integrated, it was a challenge for your team to collect and collate all the critical data from various systems, merge them together, and translate as per the platform rules of Salesforce.

Information Verification

Once we had migrated the data, we had to work with the Customer's team, to verify if all the essential information that had been migrated was intact and up to date. This was crucial so that users can continue to work seamlessly on the new platform.

Identifying Processes to Automate

When the CNET team started working with the customer's team, we realized that there are some processes like subscription billing that could be automated. Doing this would help the team concentrate on other tasks.



HIGHLIGHTS OF THE PROJECT

CNET Advantages



We helped improve the product setup and quotation process so that existing and new members would find it easy to work on the Salesforce platform



We ensured that human errors like missing details, wrong calculations and configurations would be removed to ensure that accurate and dependable quotes would always be delivered



With the streamlining of processes and automating of specific procedures, the customer's team reported a marked improvement in their productivity along with efficient planning of costs



Our support helped them avoid data lying silos, the requirement to look up multiple systems, and not having a unified overview. A single application would now take care of all their needs



The customer's team is now able to focus more on sales and customer relationships because of the automation of the right mix of products and services to create accurate quotes and contracts

ABOUT CNET GLOBAL SOLUTIONS

CNET Global Solutions enables its customers to outperform their peers by optimizing existing operations and achieving a faster time to market. We offer legacy application transformation, operations optimization and managed services. We have proven experience in application development, maintenance, and transformation which enables organizations to embark on their digital journey with agility and flexibility.

For more information:

Visit us at www.cnet-global.com or email us at info@cnet-global.com

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