



Global warranty seller guarantees streamlined sales and more productive partners using Salesforce and Oracle CPQ.

The Warranty Group (TWG) needed a better way to add more value to new and existing partners to sell extended warranties. They also had to improve their pricing and quoting process. After failing to resolve issues with new and legacy systems, TWG enlisted EDL Consulting.

"EDL consultants went above and beyond the call of duty to deliver on time, on budget results."

Paul Risk, Chief of Global Applications and Architecture
– The Warranty Group



97%

reduction in rate
retrieval time

95%

decrease in time needed
to integrate new partners



Increase in quote
accuracy

Decrease in admin
& maintenance time

ABOUT THE WARRANTY GROUP

Celebrating more than 50 years of industry leadership, The Warranty Group is one of the world's premier providers of warranty solutions and related benefits, serving more than 50 countries through its 1,600+ employees. The Warranty Group is a single-source solution that provides underwriting, claims administration, and marketing expertise to many of the world's leading manufacturers, distributors, and retailers of consumer goods including automobiles, homes, consumer appliances, electronics, and furniture, as well as specialty insurance products and services for financial institutions.

1. THE CHALLENGE

To transform an entire partner management process—from onboarding through quoting and contracting—and move it to the cloud. While some processes had been migrated, previous attempts to move core partner enablement and quote-to-sale functions were unsuccessful. Goals included:

- Developing a faster client onboarding system
- Providing multiple quoting interfaces for partners and a user-friendly quoting/rating system to handle a new rating structure
- Streamlining partner approval process and providing notifications for pending approvals
- Making pricing/rating structure easier to understand and maintain
- Eliminating errors in pricing and quotes

- Integrating new solution with legacy systems until they could be retired
- Enabling sales or marketing representatives to set up and manage partner products— from any location—rather than relying on IT or Underwriting
- Building a quote-to-sale system to accurately provide rates/prices for partner products set up with little, or no, per-partner rate setup required
- Giving partners the ability to manage their fees and commissions

2. THE SOLUTION

TWG chose Salesforce.com for its CRM and Service Cloud capabilities, Oracle CPQ Cloud for quote-generation and Web service API, and EDL for our deep expertise in both platforms and our experience in responsive design and mobile formats. Our solution facilitated partner onboarding in days instead of months, enabling them to electronically generate quotes and contracts and to streamline the process of loading product and rating data. Specifically, EDL:

- Identified salvageable code from the last implementation attempt
- Produced a new, mobile-enabled tool on Salesforce.com, making it easier to add and maintain partner products
- Created a pricing/rating engine on Oracle to calculate rates based on partner product, customer, and vehicle data
- Developed a quote-to-sale UI on Salesforce.com and Oracle
- Enabled quotes through third-party services by providing Application Program Interfaces (APIs) for receiving rates and submitting contracts
- Integrated contract activation, maintenance, and insurance claims with current processes

3. THE RESULTS

TWG marketing and sales representatives can now add new partners quickly, accurately and intuitively. At the same time, they have dramatically improved their pricing and quoting process.

- Partners now quote immediately using an intuitive TWG-provided quote-to-sale UI
- Average rate retrieval time reduced 97% — 90 seconds to 3 seconds
- Combined systems are now more accurate and intuitive with new setup tool that uses guided approach
- A 95% reduction in time required to integrate new partners — months to days
- Partners access data and produce quotes with customized rates without TWG admin help
- Salesforce.com security model enables partners to manage their commissions without accessing proprietary TWG data
- Streamlined solution requires less system administration and maintenance
- Partners can now access data and produce quotes with customized rates without TWG admin help

"EDL thoughtfully listened to our needs and translated those into impactful solutions. I would highly recommend EDL as a partner going forward."

Paul Risk, Chief of Global Applications and Architecture
– The Warranty Group