38% Improvement in Quote Cycle Time with Quote-to-Order Integration Between Conga CPQ & Oracle ERP

CASE STUDY

📝 Summary

An American video delivery technology and services client is leveraging different CPQ solutions to generate quotes and handle renewals, which are not native to Salesforce. The stakeholders (including the partners) had to juggle multiple tools, which resulted in disconnected, disjointed processes and systems.

Forsys implemented Conga* CPQ, enabled Quote-to-Order integration between Conga CPQ and Oracle ERP, and migrated 13,000+ products and 11,000+ quotes leveraging **FloData,** resulting in accelerated revenue growth.

🧩 Problem Statement

For the customer, maintenance, scalability and user experience were the major issues with the current CPQ platform. Also, it failed to accommodate the new product and pricing models. The need for a highly flexible CPQ platform that could resolve challenges related to maintenance and enhancements to product configurations, approval visibility, pricelist proliferation and subscription propelled the client to switch to Conga CPQ and retire the existing CPQ platform.

Solution

Forsys engaged with the client in mid-August of 2017 for an initial assessment of the business processes and requirements. Later on, we conducted 3 weeks of immersive strategy and advisory sessions to understand the as-is processes, pain points and potential risks during which we identified the threat as the release date was close to their license expiration date.

Our certified consultants collaborated with the client team and did a thorough investigation to nullify the risk, and proposed a solution and plan to retire the BMI by the first week of February 2018 (i.e. 8 weeks ahead of the original schedule).

Our breadth of industry experience and targeted approach ensured the implementation happened as per the proposed plan and the customer teams had sufficient time for adoption.

Our solution approach involved:

Moved 13,000+ products with over 85 complex configurators & rules from BMI to Conga CPQ.

Enabled SaaS products through Quoting Systems in addition to regular products.

Migrated 11,000+ quotes from BMI to Conga CPQ during production cut-over using FloData, and ensured that the BMI to Conga CPQ adaptors can be accessed by other customers.

Seamless Quote-to-Order integration between Conga CPQ and Oracle ERP to resolve the manual order creation challenges.

Automated the creation of price lists (a total of 20 including customer price lists) to fix the operations challenges.

Implemented a multi-currency quotation process to streamline the quoting process across multiple locations & currencies.

Deployed partner quotation process to enable partners to send quotes through Conga CPQ.

Streamlined the quotes collaboration between stakeholders (partners, internal users and operations teams).

Benefits

Since the go-live, the client has witnessed the following:

- **Improved customer response and satisfaction.**

- **Personalized journey built across the customer lifecycle.**

- **Accelerated revenue growth, and improved and optimized business efficiency.**

- **Saved thousands of hours of manual work with the automated migration process.**

- **Maximized team productivity, improved collaboration between the stakeholders, and better deal visibility across the sales lifecycle.**

About the Client

The client is an American video delivery technology and services business that enables media companies and service providers to deliver ultra-high-quality broadcast and OTT video services to consumers globally.

Conga CPQ is formerly Apttus CPQ

Technology/Tools

Conga CPQ, **FloData,** Oracle ERP, BMI, NetSuite, JIRA