



Supporting people with disability to live independent and fulfilling lives

Salesforce Products:

CPQ

Sales Cloud

Service Cloud

THE CHALLENGE:

One of Australia's largest and most proactive organisations that supports people with disability to live independent and fulfilling lives.

This organisation provides a broad range of essential services and practical skills for daily living. They hope to one day see a world where people with disabilities are equal citizens.

Part of bringing this vision to life is for the organisation to exemplify its values to be customer-focused, authentic, accountable and respectful.

Unfortunately, their business systems were getting in the way of their ability to live up to their vision.

Several Salesforce partners had already tried to simplify some of the processes across the broad spectrum of services.

However, the overall complexity only caused more issues as a result. They needed a Salesforce partner that could understand their business, see the bigger picture and help connect the right pieces.

Customer service teams also faced challenges in trying to piece together the full story about customers. Their information was not all stored in one place and instead was scattered between shared drives and Salesforce.

Across the business, many processes were still manual, despite there being an ability to automate them in the available system. Additionally, similar procedures were in place across their network of services that were duplicating effort and workload needlessly.

THE SOLUTION:

A smart solution was needed to help simplify the processes to support their business objectives.



CPQ

Following Simplus discovery and due diligence, Simplus' recommendation was to implement a CPQ (configure/price/quote), sales and service solution.

Firstly it would significantly reduce the number of manual steps involved with clients coming on board. Simplus redesigned the entire intake process so that all the necessary and relevant information was now in the one place.

All of their business users were still using the classic interface for Salesforce. The updated design, however, had a lot of great benefits, including step-by-step guided actions to help lead each user through the sales cycle.

Simplus migrated the team across to the new interface to make it easy for them to keep track of where everything was up to.

Part of the focus to reduce manual processes included digitising the paper forms used during intake. Sales team members would take up to five hours to complete the various forms and upload them into the system for just one client. With a new data structure designed by Simplus, processing the intake forms would now take less than an hour.

“We knew we needed help. If we are to become a company that truly lives our values, we needed to get our systems in order. We were already too involved in our processes to be subjective, so we turned to Simplus for help.”

APPLICATION DELIVERY MANAGER



THE OUTCOME

After implementing the Simplus CPQ solution across their businesses, the project team found they had achieved some significant benefits.



There is now a smaller selection of choices resulting from each action leaving little room for human error. All of this means that they can provide more impactful customer service.



One centralised database of customer information ensures the team can now see the whole picture at any one time, enabling them to deliver a more substantial level of customer service to their clients.



A significantly improved user experience helps the business users by intuitively guiding them through the processes of their sales cycle.



Improved productivity through smart automation removed unnecessary steps and ended up saving the business a lot of time in the process.



Streamlined workflow processes reduced the level of duplication and double handling across the team, leading to greater efficiency.



Reducing paper usage and introducing digital workflows for significant savings across both costs and time to the business.

“Before we began to roll out the updates, we previewed the new features and processes with the team. The feedback from our stakeholders was very positive, and they wanted to know when they could begin to use the new features.”

APPLICATION DELIVERY MANAGER

Simplus is Salesforce's #1 partner in Australia and New Zealand. Learn more about how Simplus supports not-for-profit organisations.

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