

keste

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Keste Case Study:

New Customer Experience Platform Provides Total Transformation

Industry

High Technology

The Company

A multi-billion dollar company provides optical technology and test and measurement solutions for a variety of industries.

Challenge

The company realized that they had reached a crossroads. To better serve their customers, they needed a single system to support:

- The entire opportunity-to-order cycle
- The complete order-to-renewal cycle
- A contextual 360° view of all customers for their sales and service users

In its previous non-integrated state, the company's IT stack held the same data across many disparate systems, both cloud and on-premise. Data synchronization was a constant challenge, preventing sales users from getting a full picture of their customers. This:

- Compromised the company's ability to close business
- Destroyed goodwill
- Reduced the ability to forecast accurately
- Lowered revenue

They needed to create a fully integrated solution that internal and external sales users could use to enter sales leads and create, modify and manage quotes/proposals, and handle pricing for their highly complex configured and non-configured products and services without any data loss or duplication.

Products Leveraged

- Oracle SOA and Adaptors
- Oracle AIA and AIA Foundation Pack
- Oracle Security Stack (IM, Directory, SSO, Federation)
- Oracle WebLogic Server
- Oracle ADF
- Oracle Coherence
- Oracle Enterprise Manager (11g)
- Oracle Enterprise dB
- Oracle Enterprise Linux
- Oracle VM
- Salesforce Integration Adaptors
- JDeveloper
- Oracle BI Publisher
- Oracle AME (Approvals Management)

Results

Based on forecasted company revenue and third party benchmarks Keste estimated the following annual benefits as a result of implementing the new system:



64%
increase in clean
orders



20%
increase in sales and
operational forecasting



\$3 million
increase in
annual sales

Solution

This led to the creation of a game-changing solution, which included 5 areas of focus:

1. Redesign of processes around CPQ in EBS. This created a scalable, mobile-enabled, and robust quoting/configuration application. This newly configured quoting solution provides quoting capabilities for both configured/non-configured products. It has decreased approval times by leveraging approval workflows, increased the efficiency of generating a quote, and reduced the quote-to-order time.
2. Complete integration of new quote management process between Oracle EBS and Salesforce CRM system.
3. Creation of a new, fully-secured portal around quoting, contract pricing, and management. This portal is an easy to use "one stop shop" that provides the sales user access to the complete quoting experience.
4. Security – single sign-on (SSO) and access management. Sales users can access the solution directly from salesforce.com and can access different views based on their roles and responsibilities.
5. Data center modernization and application modernization. Migration to a cloud managed platform, leveraging colocation services, to establish an agile, enterprise-wide integration framework for future expansion.



Results

The new customer experience platform was much more than an integration project between Oracle EBS and a cloud CRM system. This highly integrated, flexible customer experience platform provided much better user capabilities by allowing data to move seamlessly along the entire opportunity-to-order cycle across a variety of systems and platforms.

However, a seamless sales user experience was not the only benefit. Sales users are now able to get more quotes out to their customers, improving their overall sales hit rate, thanks to the streamlined quoting and forecasting process. Operational efficiencies have improved 20% since the entire quoting and forecasting process has been streamlined. In all, the system is on track to deliver significant ROI, while allowing the company to grow efficiently.

In all, there has been an increase in annual sales of \$3 million as the solution streamlines the sales process, speeds up the sales cycle, reduces incorrect orders, increases the service contract attachment rate (by 40%) and improves the productivity of both sales reps and back-office staff.

"We could not have delivered this cloud integration solution without Keste's hard work, commitment and creativity. Our partnership has led to increased sales and booked orders via this widely successful integration solution."

– Company CIO

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