

## Integrated CPQ Cloud Solution Boosts Competitiveness

Oil and Gas Production Equipment Firm Streamlines  
Proposal Process to Win New Business

### Business Challenges

A worldwide market leader in oil & gas production equipment (as well as natural gas compression, water treatment, and gas processing/treating products) found themselves dealing with an increasingly commoditized product line. This reduced them to a speed game with their competitors. Their market was turning into one of promising a manufacturing and delivery date and then making that deadline – ahead of their competitors — in order to significantly boost their sales close rate and grow market share.

Therefore, they needed to manufacture and deliver their products faster and cheaper. To do that, they needed a system that could offer the speed, flexibility and agility they needed.

A major impediment laid with their disconnected, manual, Excel-based proposal process. Key information was siloed (including the engineering metadata, which was held and updated in a 120+ columned Excel spreadsheets). This forced sales engineers to employ tribal knowledge when configuring and quoting a product (some of which consisted of thousands of configurations and tens of thousands of permutations). This lack of a systematic approach to CPQ, led to many mistakes and multiple revisions. In some cases, those revisions sent the entire quote back into the engineering pipeline. The process was slow (taking up to 24 weeks) and cost them a significant number of sales.

### The company needed to automate the CPQ process to:

- Provide users with needed visibility into ATP (available-to-promise)
- Allow different departments (sales, engineering and manufacturing) to view the status of all outstanding quotes
- Automate the approval process
- Provide a brand-standard, customer-facing proposal
- Deliver actionable data/basic trend analytics to support forecasting and planning.



This project has been a huge strategic step in our journey from a paper-based, manual world to an automated, digital world, leveraging key modern sales tools.

...Director of Business Systems

Keste is an industry expert with Configure Price Quote selection, implementation and integration. What make us special are our internal product experts. They can help you increase sales profitability by accelerating the lead-to-order process and decreasing the time and errors associated with complex proposal creation. But we do not just talk the talk. Our solutions have led to countless success stories in the high tech, telecomm and manufacturing industries. This proven track record — and the awards behind them — means that we can design and implement a seamless CPQ Cloud solution...perfect for your business goals and objectives.

Visit us online to see our  
entire solutions portfolio at:

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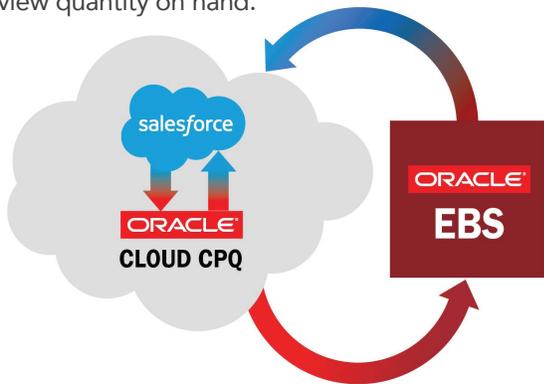


## Solution

To automate the company's lead-to-order process for standard, custom and engineer-to-order products, Keste implemented Oracle CPQ Cloud and synchronized (via Oracle SOA) all information between Salesforce, CPQ Cloud and EBS (Quote, Objects, Items, ATP).

To provide incremental functionality and speed ROI, Keste undertook a multi-phase deployment of the project.

- Phase 1 – added workflows to the approval process to get proposals to the customer quicker – with no mistakes.
- Phase 2 – combined and cleaned the engineering metadata and set up the configuration part of Cloud CPQ to work as the company's "expert" system
- Phase 3 – Integrated with Oracle EBS to help with ATP visibility and allow users to understand both the manufacturing schedule and view quantity on hand.



## Business Benefits

Keste's CPQ solution has led to greater customer responsiveness, higher customer satisfaction, fewer errors and more wins.

The company has been able to double the number of quotes generated without having to increase manpower. In other words, they're able to scale their lead-to-order cycle as they grow their business. They were also able to dramatically streamline and speed up the entire process and improve system visibility into sales opportunities. This has allowed them to remain competitive and win more business in an extremely fast-paced and increasingly commoditized industry. For example, the company has been able to:

**Automated workflow to streamline quote approval process and improve efficiency and speed.**

**A seamless, integrated user experience with sufficient product data visibility to eliminate proposal errors.**

**Trend analysis reporting to provide immediate visibility and support better decision making.**

**Creation of unified proposal document that meets corporate branding standards standards.**

These efficiency gains are delivering a level of sales growth that has allowed the company to effectively scale their sales organization, efficiently allocate resources, and become extremely responsive to their customers' needs.

Contact: [solutions@Keste.com](mailto:solutions@Keste.com) or +1 877-537-8360 to learn more.

Or visit us online to see our entire solutions portfolio at: [www.keste.com](http://www.keste.com)

## CASE STUDY HIGHLIGHTS:

**CUSTOMER:** Oil and gas production equipment, natural gas compression and water treatment products

**INDUSTRY:** Oil and Gas

### BUSINESS CHALLENGES

Needed to automate a manual, disconnected, Excel-based sales proposal process, providing integrated approval workflows and adequate reporting tools.

### KESTE SOLUTION

- Streamlined the proposal process for standard, custom and engineer-to-order products, implemented Oracle CPQ Cloud and synchronized (via Oracle SOA) all information between Salesforce, CPQ Cloud and EBS (Quote, Objects, Items, ATP).
- Multi-phase deployment — providing incremental functionality throughout the project.

### BUSINESS BENEFITS

The company has been able to:

- 1) Double the number of quotes (using the same amount of human resources) and cut the time needed to get a proposal through the system in ½ (from 4-24 weeks to 2-12 weeks) in order to **generate an additional \$250M in annual revenue.**
- 2) Reduce one FTE engineer and one administrative staff needed to manage the status of the quotes and opportunities.



Specialized  
Oracle BigMachines  
CPQ Cloud Service

keste