CASE STUDY
Force.com Proposal Generator & Order Entry Solution
Leading Media Company

An Emtec Company

SILVER
CLOUD ALLIANCE PARTNER

FORCE.COM APPLICATION STREAMLINES PROPOSAL PROCESS

A leading media company turns to Wave6 and Salesforce to track and drive advertising sales via web and mobile channels.

THE BUSINESS CHALLENGE

The company receives RFPs from advertising agencies who wish to buy media on behalf of their clients. An advertising plan is created in response to the RFP. Ads can be packaged in a variety of ways resulting in a complex array of products and prices.

The existing sales system relied on Excel spreadsheets to track the large number of ad packages and prices. The lack of a centralized system posed several challenges. Sales team members could develop products and prices that were not standard, quote different prices for the same package, or even create packages that were not allowed. The Excel-based system also did not allow a way to monitor approvals of price quotes nor was it scalable. In addition security was also a concern with an Excel-based tool.

Potential revenue was further affected by issues around:

- Response time for getting back to agencies with quotes

- Risk of overselling capacity

- Lost opportunities due to overlooking an RFP

- No ability to track outstanding proposals

- Lack of accurate revenue forecasts and analytics

These issues often led to the inability to specify product combinations, capacity issues and high staff turnover. Getting reps up-to-speed took time. An automated and user-friendly system would make it easier to maintain a consistent sales effort.

THE SOLUTION

Wave6 worked closely with representatives from the client's sales and IT departments to gather requirements to develop a system that delivered unified, professional price quotes. This discovery phase proved exceedingly helpful in both creating a complete understanding of the complexities of the ad sales process as well as an estimate of the costs and resources required for the project.

Wave6 implemented Salesforce to replace their existing spreadsheet-based pricing and proposal system. We leveraged the Force.com platform to extend the functionality of Sales Cloud to meet the client's challenges around the large number of products and prices, the need to track outstanding proposals and the ability to forecast sales.

Referred to internally as Proposal FX, the Force.com application is used by sales to determine pricing, capacity and availability along with share-of-voice when creating an advertising plan. The system provides immediate forecasts of inventory, availability of sponsorships and accurate real-time pricing.

Because there are numerous ways to target customers (geographic, demographic) and many product options, the data model is highly complex. Wave6 built a metadata-driven model to allow for flexibility and scalable maintenance. We developed custom pricing logic that factors capacity, share-of-voice, how long ads appear, and product type (e.g. items with premiums).

ABOUT EMTEC ®

Wave6 is a subsidiary of Emtec, a provider of technology-empowered business solutions for world-class organizations. Emtec's collective focus is clients for life: long-term enterprise relationships that deliver rapid, meaningful, and lasting business value. Service offerings include:

- IT Strategy Consulting

- Enterprise Application Services (CRM, ERP, EPM and HCM)

- Custom Application Development and Support

- Infrastructure Services

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Standard Pricing Approval was created to ensure margins are acceptable based on capacity.

The system also contained a risk calculation to determine when there might not be enough capacity to fulfill a proposal.

ERP Integration

Wave6 also configured Salesforce to work with the company's Operative and Yieldex systems to get real-time availability and auto-creation of orders from Saleforce.

RESULTS

The Proposal FX Force.com application is expected to provide the following benefits:

- A scalable platform that can grow

- Visibility to outstanding/open proposals

- Improved price quotes due to standard business rules

- Protect margins with pricing approval

- Improved ability to manage, predict and report on risk

- Better forecasting

- Improved security

- Enhanced approval and workflow process

- Product and Pricing Analytics related to proposals integrated with Qlickview

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TECHNOLOGY

Technology includes:

- Salesforce Sales Cloud

- Force.com

- Custom Apex Development

- Custom VisualForce Development

- Custom Javascript Development

- Operative Integration

- Yieldex Integration

- QlikView

- Dataloader