

CASE STUDY



Business Profile

A complete boiler room solutions provider

Industry

Manufacturing

Geography

North America, Mexico, China

Solution

Configure Price Quote (CPQ)

Benefit

- Quotes generated in 15 minutes – down from 4 hours.
- Eliminated errors in quotes.
- New reps productive in first week, despite very complex product.

Cleaver-Brooks Makes Quotes for Complex Boilers in 15 Mins Flat

Founded in 1929 Cleaver-Brooks is a complete boiler room solutions provider. Headquartered in Thomasville, GA the company is the sole provider of integrated boiler/burner/control solutions and is a leading manufacturer of boiler room equipment across commercial, institutional, and industrial markets.

The Challenge

In the early 2000s Cleaver-Brooks realized they had a problem: sales quotes were inconsistent, error-prone and time consuming to create, given how incredibly complex their products were. They tried a distributable product selection and an online ordering system, both of which failed to take off.

Boilers are complex products with numerous controls and components. For instance, to sell a Firetube Boiler, the company's bread and butter business, one would have to choose what fuel it would run on, drives, controls, safety valves etc. Some of this was driven by specs, others by customer requirements, code, and how the equipment was to be applied. There are thousands of options and millions of different combinations for just the Firetube boiler. Due to the complexity of the products, it was impossible for reps to be experts on all the products. So reps would quote equipment that they were more familiar with, rather than what the customer really needed.

To sell, reps needed to lug around some heavy material: a 575 page price book and a 1,000 page boiler book which listed all the product specifications. Quoting was a time consuming manual process; reps often used dated material and inconsistent branding, causing many mistakes. And mistakes were expensive to fix, running into tens of thousands of dollars, especially if the equipment had already been deployed.





“ You basically give the sales rep 1-2 days of their week back (with CPQ)...When you give back time to reps you are encouraging them to sell solutions to customers instead of just reacting to specifications. ”

Chris Weckler,
Development Manager -
Sales Tools, Cleaver-Brooks

The Solution

In 2005 Cleaver-Brooks adopted CallidusCloud's CPQ and has used it ever since. The entire product portfolio was built into CPQ with 43 different configurable products, representing five different divisions, two different channels, operating under unique brands with thousands of variables and tens of thousands of rules built-in. With CPQ all the complexity is still there, but it is all buried behind the scenes so the rep no longer has to deal with it directly, with calculations done automatically, and appropriate options listed.

In order to smoothen the transition from the paper world to the online world, the company created the same tabs within CPQ that the reps were used to in the offline world. So if a rep knew where a particular option was in the price book, immediately they knew where to find it within CPQ. That really helped people get comfortable.

Cleaver-Brooks now generates accurate, consistent proposals all of which carry the most up-to-date pricing, correct options, uniform branding, and terms and conditions in a 30-35 page indexed format for million dollar boilers in a matter of minutes. Based on the configuration the pictures, diagrams, and copy change automatically. No longer can the reps configure something that the company can't build. CPQ enabled the sales force with information at their fingertips, making selling easier, faster and repeatable, thereby increasing sales and margins.

The tool encourages reps to upsell; if a rep is preparing a quote for a boiler, the tool suggests an economizer which the rep can select in a series of clicks and put in front of the customer along with its performance information and potential for monetary savings.

The Results

Generating a quote for a complex product was a 4 hour process which reduced to just 15 minutes with CPQ. Between the company's reps and distributors some 1,200 people use CPQ to generate some 500,000 quotes.

New reps are onboarded faster because CPQ puts all the information at their fingertips. Despite the complexity of the equipment, new reps have actually gone from quote to close in their first 5 days with the company.

In terms of intangible benefits from CPQ, the company reexamined and simplified its business processes, filled gaps in its product definitions and pricing, and captured tribal knowledge.

About CPQ by CallidusCloud

CPQ is a deal maximizer and deal accelerator. It is an online and mobile solution that simplifies your quoting and selling process making it easy to produce quotes with the best combination of products, options, and services.

For more information on CPQ by CallidusCloud, visit:
<http://calliduscloud.com/products/quote-software/>
Or call **1 866 812 5244**.

