AllCloud | **BEVOLO** — established 1945 — GAS & ELECTRIC LIGHTS

Bevolo Transforms Sales & Quoting Processes with Salesforce and AllCloud

Bevolo Gas & Electric Lights is a family-owned business founded in the heart of the French Quarter in Louisiana in 1945. For over 75 years, Bevolo has made hand-crafted, high-quality artisan lanterns that are built to last a lifetime. Throughout its history, the company has regularly transformed and is now a thriving, innovative 21st century business without compromising the quality of their hand-made lanterns.

The Challenge:

Bevolo recently decided to make its sales process faster, easier and more connected as part of an initiative to continue to grow and innovate. In particular, Bevolo identified three key challenges:

1. Inability to tie sales directly to inventory
2. No comprehensive CRM system to keep all sales processes in one spot
3. Lack of comprehensive rules around quoting

Specifically, Bevolo had always relied on manual processes for tracking sales pipeline, coordinating between sales and production and storing customer information, quotes and orders. But these manual processes created inefficiencies and limited Bevolo's visibility into sales data, such as how many orders were in process and how many were incoming.

In terms of quoting, Bevolo's lanterns are very intricate, with various options for building blocks like material, utility and style that can affect pricing. However, sales people didn't have access to any kind of automated quoting for different product bundles, which forced the company to rely heavily on training and micromanaging order placements -- a less than ideal approach that was time-consuming and left room for human error.

The Solution

Based on its challenges and goals for improvement, Bevolo identified a modern CRM solution equipped with CPQ capabilities as the best way forward. Bevolo researched a variety of solutions and landed on Salesforce as the CRM best equipped to meet its needs. The company also decided to partner with AllCloud, a Platinum Salesforce Partner, to lead its implementation.

AllCloud began the partnership with an upfront discovery, taking the time to understand Bevolo's business, including the challenges with its current state and its goals for the future. This discovery enabled the AllCloud team to present Bevolo with a full plan of recommendations on how to effectively implement Salesforce to achieve its immediate goals and drive continued business growth.

Ultimately, AllCloud helped Bevolo implement a Salesforce solution covering:

- Salesforce Sales Cloud, including the ability to manage the sales pipeline from Lead through Opportunity and bring all sales data into a single view
- Salesforce CPQ to automate and standardize quote generation and product bundle configurations (i.e. lantern size, bracket style, etc.)
- Dynamic, automatic pricing based on bundle attributes and add-ons, including:
  - Avalara Tax package to generate accurate taxes for each state
  - ZenKraft package to generate accurate shipping quotes based on destination and shipping speed
  - Chargent package integrated with point-of-sale system to collect payments in store, online and over the phone
- Integration with inventory management and manufacturing systems to automatically move orders to fulfillment once they get placed and share a shipping alert once the order is complete

The Result

With the initial implementation, Bevolo has seen enormous success with Salesforce. Key wins for the team include increased efficiency, improved accuracy and an overall better customer experience due to automated and streamlined sales processes.

Specifically, creating a quote previously required multiple people working across systems and the process left room for errors when calculating taxes and shipping costs and when putting together potential inputs to the product, as sometimes the end result was not possible to produce. Salesforce has resolved these challenges by reliably calculating various costs and prices in real-time as users adjust elements like product inputs and shipping destinations and by putting guardrails around which inputs can be put together. Ultimately, this automated approach ensures sales people can give fast, accurate quotes every time.

Additionally, the data now available in Salesforce saves users time by bringing together information from multiple data points in a single place. Equally as important, having sales data from all stages of deals logged in Salesforce gives Bevolo visibility into its sales pipeline for better forecasting and reporting on business growth.

These wins have led Bevolo to consider Salesforce a "transformational program," and the company is already looking for opportunities to grow its usage of Salesforce to continue to gain efficiencies and drive innovation.

AllCloud has been incredible in helping us optimize our Salesforce set up, implementation, and ongoing everyday use. The biggest change that we've seen as a business is that we are much more accurate and nimble with this software.

Chris Bevolo, Bevolo

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www.allcloud.io   info@allcloud.io