



Braen Supply Automates and Improves Configure, Price, Quote for Streamlined Sales with Salesforce and AllCloud



Braen Supply is one of the largest suppliers of construction materials, serving contractors across northern New Jersey. Founded in 1904, Braen Supply is a family business built on the motto that “greater reward is in the serving, not the selling.” This commitment to customers has helped the company become one of the most trusted partners in the construction industry.

Challenge

Braen Supply recently recognized an opportunity to improve the ordering experience for their customers and increase trustworthiness throughout the process. Specifically, Salesforce and their point-of-sale (POS) also did not integrate property, leading to inaccurate data in Salesforce. As part of the effort to remedy this integration, the team also wanted to automate the quoting process with a Configure, Price, Quote (CPQ) solution to send more accurate and consistent quotes and do so more efficiently.

Previously, the team would generate quotes manually, pulling data from Salesforce. However, this meant they couldn't deliver quotes to customers in real-time, and the inaccuracy of Salesforce data led to challenges around consistency in pricing (especially for bundles), branding, and terms and conditions. The situation became even more complicated when promotional pricing or custom sales unit pricing was involved.

Braen Supply already used both Salesforce Sales Cloud and Service Cloud, and quickly identified Salesforce CPQ as an ideal solution to resolve these challenges that would fit well within their existing architecture. They quickly began the implementation, which would also include an integration with the company's ERP system, Epicor, and improvements to their case management process. Unfortunately, they ran into several roadblocks along the way and decided they would need to change course to realize the desired results.



Solution

When Braen Supply decided to change course on the CPQ implementation, the team knew they would need an experienced partner to guide them forward. This search led them to AllCloud, a Platinum Salesforce Consulting Partner with deep experience in CPQ implementations.

Braen Supply engaged AllCloud for managed services, working with a team of experts, including a dedicated solution architect, on how to improve the company's initial CPQ implementation.

To start, the AllCloud team went onsite to conduct an in-person business process review with Braen Supply to gather their requirements, understand their existing business process and capture their end-user pain points. Based on this review, AllCloud scoped out priorities and confirmed the recommendations with Braen Supply.

All of the recommendations centered around increasing efficiency for Braen Supply's end-users. Specifically, AllCloud helped Braen Supply improve the initial workflow for generating quotes in Salesforce and improve how the data flows between Salesforce and Epicor. This included allowing the sales team to create different types of opportunities in Salesforce and then calculating quotes based on the type of opportunity and other details they put into the system. Once Salesforce CPQ calculates that information, it passes the data to Epicor to ensure the two systems remain in complete alignment. AllCloud invested heavily in making sure the two systems would always show the same information and be able to pass data back and forth in an automated way. Further, with the addition of Salesforce bundles, Braen Supply was able to solve their challenge of lengthy quote times, use Salesforce as a training tool for new inside sales representatives and empower new and seasoned reps alike to upsell customers.

Finally, the AllCloud team tightened the integration between Salesforce CPQ and Braen Supply's larger Salesforce ecosystem, which includes Sales Cloud, Service Cloud, DocuSign and Conga. Since Braen Supply has a mature Salesforce ecosystem, this effort involved pulling in data from different objects that go beyond the standard Salesforce reporting in order to provide more detailed insights into specific accounts. The team can then use these insights to inform the quotes they generate and make sure new details tied to the quotes get represented on each account.



Results

Braen Supply has seen significant improvements in their CPQ program since partnering with AllCloud.

Working with AllCloud's managed services team gave Braen Supply the opportunity to take a step back and map out their requirements for a CPQ program. This planning allowed everyone to understand exactly what was needed as well as how Salesforce CPQ should be configured to solve those problems. It also helped align the team on the best way to integrate Salesforce CPQ with the company's ERP system and how to align those efforts with the broader Salesforce ecosystem already in place.

Early wins for the team include increased efficiency around quote creation as well as internal and external case management, tighter alignment around reserving inventory and better utilization of Epicor and Salesforce together. The team has also found value in the ability to use Product Bundles for items that are commonly grouped together.

This initial work went so well that the joint AllCloud and Braen Supply teams quickly identified an opportunity to expand the CPQ implementation to Braen Supply's supply team, which leads high-velocity sales for customers who visit the company store rather (as opposed to contractors with larger projects). This effort has built on the initial success, bringing more consistency and efficiency to the quoting process across the entire business.

Since then, Braen Supply has also partnered with AllCloud on other projects within the Salesforce ecosystem, including implementing Lightning Scheduler, complete with customized flows that allow customers to schedule time to talk to the team as part of the quoting process.

Overall, Braen Supply attributes the CPQ turnaround to the AllCloud team's partnership and deep expertise.

"AllCloud was exactly the partner we needed. We had a vision for CPQ that just wasn't coming together, but AllCloud stepped in and immediately showed us how to make that vision a reality. Their experience with complex CPQ implementations made all the difference. Beyond that, the team has helped us think holistically about our entire Salesforce ecosystem to make improvements that will benefit our business (and our customers) for years to come."

- Jessica Panicucci, Marketing and Salesforce Manager, Braen Supply