AllCloud | **BRAND〉SAFWAY**™

BrandSafway Standardizes and Automates CPQ with Salesforce and AllCloud

BrandSafway is a leading global provider of access, specialized services, and forming and shoring solutions. Based in the United States, BrandSafway was created in 2017 when Brand Energy, Infrastructure Services and Safway Group merged. This merger gave BrandSafway the most comprehensive range of services, products and solutions, with the greatest depth of expertise for the industrial, commercial and infrastructure markets. A portfolio company of Clayton, Dubilier & Rice, BrandSafway has nearly $5 billion in revenue, approximately 35,000 employees and over 350 locations in 30 countries.

The Challenge

BrandSafway's growth through the merger of two market leaders and several acquisitions created a global force with unmatched expertise. However, this growth also left BrandSafway with a multitude of processes and tools that differed across regions and divisions.

Recognizing the limitations these inconsistencies would pose, BrandSafway quickly identified the need to standardize its sales processes and technology. This recognition led BrandSafway to implement Salesforce Sales Cloud for activity management for its global sales team in 2018. Implementing Sales Cloud was an important first step, but it was only the beginning. Following the success of the initial deployment, BrandSafway began to evaluate Salesforce for CPQ.

Under the current state, each division and region had its own quoting process, most of which were manual. This left sales reps with time-consuming processes and led to inconsistent approvals, branding and formatting. Additionally, the differentiated and largely spreadsheet-based processes gave BrandSafway minimal control and visibility into quotes across the organization.

The Solution

Based on the success of its Sales Cloud implementation, BrandSafway decided to move forward with automating and standardizing CPQ on Salesforce. BrandSafway also chose to work with AllCloud, a trusted Platinum Salesforce Partner that led its Sales Cloud deployment.

BrandSafway and AllCloud began the process by determining the best way to minimize risk and ensure success for this transformational project. To achieve this goal, BrandSafway and AllCloud decided to pilot the new technology and processes in one division and use that test case to demonstrate value and get buy-in for a global rollout. Ultimately, they decided to start with a division in Romania, whose smaller size would provide the right foundation to build on.

Upon choosing the pilot division, AllCloud got to work rolling out Salesforce CPQ for BrandSafway. This effort involved scoping the project based on the organization's needs, building and testing the solution and then leading hands-on, onsite training for users to ensure successful adoption. The end CPQ solution for BrandSafway involved:

- Extending the functionality of the existing Sales Cloud environment for leads and opportunities to introduce an automated and standardized quoting process
- Building quote templates and introducing version tracking, advanced approval processes and reporting capabilities
- Automatically defaulting pricebook, currency, language, output documents, text and email templates based on the branch associated to the opportunity

The project also required AllCloud to account for several unique needs, including:

- Integrating Salesforce CPQ with Oracle, BrandSafway's system of record for products and prices
- Developing a custom plugin to calculate different prices for renting vs. selling products
- Integrating BrandSafway's engineering tool as a system of record for bundles and calculating pricing for those bundles based on customer needs, such as square footage

The Result

Following the initial launch of Salesforce CPQ, BrandSafway has seen positive results and a high adoption rate.

To start, having an automated and standardized quoting process has saved significant time for both the sales and engineering teams. Whereas it could take sales reps a week to put together a complex quote — for which they would also need to involve the engineering team — sales reps can now build a quote on their own in 10 to 15 minutes with confidence that it's accurate.

Having CPQ within Salesforce has also helped maximize the value of the CRM solution beyond activity management. Now, sales reps get significant added value from using Salesforce to generate accurate quotes quickly and easily. The time saved and better use of resources has also resulted in faster sales, improved visibility and effective reporting for BrandSafway's leadership.

Next, BrandSafway plans to use the initial CPQ pilot to demonstrate success and get buy-in to roll out Salesforce CPQ to the entire sales organization in phases.

Along the way, BrandSafway has valued AllCloud's expertise.

None of this would have been possible without AllCloud's expertise. The quality of their resources, flexibility in structuring processes to meet our needs and overall responsiveness have gotten us to where we are today. AllCloud is a trusted partner, and we plan to do even more with them as we continue to grow our Salesforce ecosystem.

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