

Case Study

How Cloudely Inc. improved the time taken to generate heavy dynamic quote documents for the Global Leader in Personal Aviation, USA.

About the Client

Cirrus Aircraft is an aircraft manufacturer founded in 1984 and headquartered in Duluth, Minnesota, United States.

Cirrus markets several versions of its certificated single-engine light aircraft models: the SR20, SR22, SR22T, SR22T Special Edition, SF50 G2+ & SF50 G2+ Legacy.



Business Challenges

- **Complex & time-consuming quoting process** for both Domestic & International markets.
- **Add on features** to customize the Aircraft build based on the customer needs.
- **Impact due to Salesforce depreciation** of crucial APIs.
- **Incompatibility of the existing CPQ functionality**/configurations with the newer versions/features.
- **Low user awareness** of the then available Apttus/ Conga implementation for Quoting & Contract Lifecycle.
- **Display of multiple product images** dynamically on the Quote documents.
- **Dynamic display of Products and Addendum description**, Aircraft specifications on to the Quote document.

Solutions Implemented

CPQ Configuration

Products – Configuration of various Aircraft models with different catalogs.

Bundles & Options - Configuration of more than 200+ options including nested Bundles.

Pricing – Configuration of various pricing methods including prices for Domestic and International quoting and sales.

Conga Document assembly rule feature for efficient & timely generation of Quote documents.



Templates & Output Documents

Configuration of multiple Quote templates (25+) based on the record type, Product/Aircraft models, regions, Product Specifications & Terms & Conditions.

Template mapping using X-Author to generate Quote documents with dynamic prices & product images based on the selection of Aircraft model, version, color, features, interior/exterior style etc. while quote creation.

E-Signature Integration for Quote and Order documents.

Conga Upgrades

Periodic Upgradation of installed packages to latest versions to gain the benefits of enhanced features of the latest Conga releases.

End-to-End/Regression Testing to validate the existing functionality of the system for high stability.

Documentation of the essential process/steps and changes post upgradation.

Train the Trainer

Provided training to the Super Users on the complete Quoting process including all business use cases.

Documentation of User Guides with step-by-step process of the complete flow.

Results

- **55% time saving** in time taken to create Quotes.
- **60% reduction in turnaround time** for deal closure.
- **65% time saving** in time taken to generate Quote documents.
- **Improved Quote documents** with multiple dynamic product images.
- **Stable and improved CPQ** tool/software with latest enhanced features.
- **80% better understanding** of the entire CPQ process among users.



About Cloudely Inc.

Cloudely started its journey in 2013 with a vision: *to disrupt the way enterprises and business manage cloud applications.*

Cloudely Inc. holds a decade of proven experience in delivering Contract Management, Quote to Cash, Salesforce Implementations.

With its global presence, with headquarters in California and Center of Excellence in Hyderabad, India, Cloudely is committed to surpass customer expectations and making ideas happen by flawlessly leveraging human intellect and technology.

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