



HVAC and Boiler Sales Move to the Cloud



Sales Reps Work Online or Offline to Produce Professional Quotes at the Point of Sale

Constellation has been providing heating, cooling, electrical and plumbing services in Maryland for decades. They specialize in heating and air-conditioning installations and repairs along with plumbing repairs and electrical services that make people more comfortable in their homes.

Industry

Home Services and Light Commercial/HVAC, Electrical and Plumbing

Location

Baltimore, Maryland, USA

Goal

Turn a paper process into a more efficient, professional online process

Challenges

- Integrate with Microsoft CRM in the cloud
- Offline capability with ability to re-sync with online data

Solution Selected

Cincom CPQ™

Expected Results

- Increased close rate
- Improvement in operational efficiencies
- Increase in order accuracy
- Reduction in errors



The Opportunity

Constellation's HVAC Sales Division was providing personal, in-home service; however, everything was dependent upon paper. The sales team worked from Excel spreadsheets that were printed and placed in binders. At the customer's home, Constellation's reps would present what was available from these spreadsheets, take orders on paper and bring them back to the office, where someone would manually enter them into an ERP system. This process was cumbersome to say the least. The company wanted a more efficient online process that would result in an immediate, professional-looking presentation they could leave with the customer.

Keith Brierley-Bowers, Director of Business Processes, was in charge of leading the search, along with a team of sales management and IT professionals. He says, "We had already selected three tools for evaluation when we met Cincom at a Microsoft User Group Conference. We struck up a conversation, and they quickly became the fourth vendor we wanted to evaluate."

The Assessment

According to Brierley-Bowers, "We were looking at how a new tool would integrate with our environment. We wanted something that could 'bolt on' to our Microsoft CRM in the cloud. That eliminated a whole lot of folks.

"Another key qualification was that the tool needed to be able to work offline and then re-sync with the online data. If we were in a home where there wasn't good cellular reception, we needed to work offline.

"The evaluation and selection process took just over two months. Cincom rose to the top because they met the two qualifications defined above, were very responsive, gave good demos and were perfectly happy to talk technically about how it would work for us. Additionally, they gave us references to speak with on our own.

"Additionally, Cincom passed the size and financial-health types of requirements that our compliance and legal folks always want. Then it really just came down to features and functions and whether Cincom seemed like people we could work with moving forward. That's an important criteria, but it's not one you always have nice little checkboxes for."

The Implementation

Brierley-Bowers says, "Cincom helped us build out some of the more complex pieces of our implementation. When

issues arose, as they do with all implementations, Cincom worked with us to address them quickly so we could remain on track."

Brierley-Bowers continues, "One of the things I really like about Cincom CPQ is that it digitizes information we need at the point of sale. That allows us to do much more process automation throughout the pipeline."

Lessons Learned

One thing Brierley-Bowers says he would do differently is to spend more up-front time, really going through the detailed process that their sales force uses with the various forms. "They've been doing it manually for so long that many parts of the process exist only in their heads. It's only once we start trying to produce those documents that they say, 'Oh, well we do these 12 things with that box, even though it says only one.' When we provided the document requirements to Cincom, they were looking at a piece of paper with 20 boxes on it, so they assumed 20 data elements. Well, it turns out it's actually 75 data elements."

The Results

"Cincom CPQ is having a large positive impact on our sales, sales support and our install support teams. It's already made it easier to onboard new sales reps because many of the rules they previously had to remember are embedded in the application. Our veteran reps really like carrying a thin tablet instead of a 12-inch binder and a folder full of paper forms when they walk into a house. And the professional presentation seems to be having a positive impact on our customers, too."

Future Plans

Constellation expects to expand the use of Cincom CPQ from its HVAC Install Sales into its other install lines of business and possibly service contracts, as well.

Brierley-Bowers concludes, "Cincom CPQ is a good solid tool that integrates easily with Microsoft CRM and offers a lot of functionality. There are alternatives from other vendors that are cheaper and lighter weight.

"And Cincom has been great to work with. They are very competent, seasoned professionals who are invested in our success. They really wanted the tool to work for us the way we wanted. They were patient and all the things consultants and implementation people should be.

"Overall, our implementation experience was great, and I would definitely do this again."

