

TECHNOLOGYONE: UNLOCKING THE POTENTIAL OF SALESFORCE CPQ WITH PANAYA FORESIGHT

Overcoming Documentation Challenges to Improve Efficiency and Effectiveness



technologyone

CUSTOMER PROFILE:

Software Development

WEBSITE:

www.technologyonecorp.com

LOCATION:

Global

NEED:

- Gain control over a Salesforce CPQ Configuration
- Ensure reliable documentation for future development and maintenance
- Troubleshoot complex automated processes
- Accurately plan new features and enhancements

THE IMPACT:

- Investigation time of processes within the CPQ system has been shortened from a day or several hours to just 30 minutes
- Improved accuracy of results in examining complex processes
- Increased efficiency and effectiveness of the CPQ team
- Reduced reliance on external resources

ABOUT TECHNOLOGYONE

TechnologyOne is a leading global SaaS ERP solution and Australia's largest enterprise Software as a Service (SaaS) company, with offices across six countries. TechnologyOne's solutions transform business and makes life simple for their customers by providing powerful, deeply integrated enterprise software that is incredibly easy to use. Over 1,200 leading corporations, government departments and statutory authorities are powered by TechnologyOne's software.

THE CHALLENGE

TechnologyOne has started an implementation project of Salesforce CPQ which was designed and executed by a third-party system integrator. The planning phase took almost a year and the system went live in January 2022. Due to complexity with TechnologyOne's requirements, which arises from the breadth of its product offering, the number of different markets it operates in and the desire for automation, the implementation of Salesforce CPQ becomes even more challenging. As an example, their full catalog includes approximately 700 modules. There are also customisations which automates multiple steps in business processes involving different quotes and contracts.

After launching the project TechnologyOne has realized that the documentation provided by the system integrator to support the implementation was not sufficient. As a result TechnologyOne was dependent on the system integrator to fully understand this complex implementation. They realized that they need a way to take control over the system and looked for a solution to validate the documentation provided by the system integrator, complete gaps in documentation and be able to keep developing new features without risking existing processes.

“We needed to produce documentation, but didn't know where to start. Without proper documentation it was impossible to move forward and keep improving the system. It was also challenging to understand what has happened when something went wrong.”

Jacqueline Ho, IT Director at TechnologyOne

THE SOLUTION

At this point, TechnologyOne recognized the need for a tool to help them with their challenges. They began their search and eventually discovered Panaya ForeSight. With Panaya ForeSight, they were able to easily understand the workings of even the most complex processes and complete missing documentation.

Panaya ForeSight has also proven invaluable when troubleshooting was necessary. Given the TechnologyOne's requirements in automation, which often involve multiple customizations within a single process, it was difficult to identify every object and automation related to each process. However, with Panaya ForeSight, when something failed, they could quickly identify the root cause of the issue.

While documentation was the initial reason for choosing Panaya ForeSight, over time TechnologyOne realized that this solution gave them the confidence to understand the system, the assurance that updates could be made without causing any harm, and a quick and efficient way to troubleshoot and resolve issues. Today, TechnologyOne manages and enhances their CPQ system in-house and uses Panaya for planning new features and for evaluating the impact of changes to existing configurations.

THE RESULT

Before using Panaya, TechnologyOne faced difficulties when trying to investigate processes within the CPQ system. They had to rely on a developer to extract the code from Salesforce and then attempt to comprehend it, which could take anywhere from a few hours to a day. The results of these investigations were not always accurate and were dependent on the availability of the developer. With Panaya ForeSight, understanding complex processes now only takes approximately 30 minutes and the results are completely trustworthy. The use of Panaya has allowed the CPQ team to work more efficiently and effectively, without being dependent on any external or internal resources.

“After trying Panaya, we knew that we need to have this tool. This is the only way we can have the confidence to go live. We went from asking: how are we going to manage this volume of detail? to knowing that we are in control here. We can definitely manage this!”

Jacqueline Ho, IT Director at TechnologyOne



ABOUT PANAYA

Panaya enables organizations to accelerate application change and continuously deliver innovation with its Change Intelligence Platform. Panaya provides cloud-based application delivery and testing solutions that ensure collaboration between Business and IT. Enabling enterprise agility with faster release velocity and uncompromising quality, Panaya delivers an optimized user experience with end-to-end visibility of the application lifecycle. Since 2006, 3,000 companies in 62 countries, including a third of the Fortune 500, have been using Panaya to deliver quality changes to enterprise ERP & CRM applications.