



## I D C C U S T O M E R S P O T L I G H T

# Using the Cloud to Simplify and Automate Product Configuration, Pricing, and Proposals

October 2011

Sponsored by FPX

### Introduction

Tiburon Inc., based in Pleasanton, California, is a leading provider of integrated software solutions for public safety. The company offers cloud-based solutions that include dispatch, mobility, records management, and corrections management systems for federal, regional, and metropolitan public safety and corrections agencies.

Tiburon offers solutions in two primary areas. The first is computer-assisted dispatch software, which helps 911 communications center dispatchers keep track of resources in real time so that they can match those resources to incidents as calls come into the center. The computer-aided dispatch software takes advantage of public safety organizations' widespread use of laptops, tablet computers, and other mobile devices. Information is available to both the dispatcher and the responders in the field so that the proper personnel and equipment are sent to handle emergencies. They have access not only to information such as location and type of emergency but also to supplementary information that provides situational awareness, such as firefighters' records of the locations of hazardous materials, building floor plans, and nearest hydrants. Similarly, police officers can check for outstanding warrants, prior arrests, and gun permits on residents of an address before they arrive on scene.

Tiburon also offers records management solutions that help automate public safety and security operations. Public safety facilities require significant administrative functions to ensure that all activities are documented, run smoothly, and are in compliance with all regulations. Items that need to be tracked range from employee records to booking photos, parking tickets, and arrest records.

The company's key challenge in delivering its solutions is managing the numerous elements that go into putting together and implementing a solution for each installation. Critical for the company was providing a way for the sales force to develop the proper proposal and pricing in an industry filled with changing requirements and incompatible products that must be managed by the solution. For years, the company depended on a complicated multitab spreadsheet with many formulas. As a result, it was difficult to create multiple pricing scenarios and make last-minute changes to proposals.

### Solution Snapshot

**Organization:** Tiburon, a provider of automation solutions for safety, emergency, and corrections facilities

**Operational Challenge:** Automate the highly complex product pricing, configuration, and proposal process in a market that requires custom solutions that include product integration and dependencies while linking the solution into an existing sales force automation tool

**Solution:** CPQ OnDemand — a cloud-based product configuration, pricing, and proposal generation solution from FPX

**Project Duration:** Phase one lasted nine months, while phases two and three lasted between three and six months

**Benefits:** Faster, more accurate proposals; more efficient salespeople; and integration of information into sales force automation for better overall management of the process

In addition, this approach to creating proposals relied more on the spreadsheet experts, not the solutions experts. So the company wanted to gain the ability to have consistent, accurate pricing and configuration in a way that was available to everyone involved in the sales process. As an added measure, Tiburon decided that it needed a solution supported and enhanced by a software company instead of an internal person.

## **Implementation**

Initially, Tiburon tried to use its online sales force automation solution by itself. Unfortunately, there was no easy integration of pricing into the solution. The company could attach the spreadsheet to a proposal, but people would forget or mistakenly use an older version, and it was difficult keeping good records. In addition, Tiburon has salespeople in multiple international markets, so pricing consistency was difficult. The company formed a task force to find the right pricing solution to add to its sales force automation software and selected CPQ OnDemand — a cloud-based configuration, pricing, and proposal generation solution — from FPX. CPQ OnDemand is a highly customizable solution that works with sales force automation and customer relationship management tools so that organizations can create, track, and manage customer-driven proposals using a mobile sales force.

Tiburon used a multiphased approach to implementing the FPX solution, primarily because the solution required a great deal of customization — like all solutions that must accommodate a broad range of products and customer use scenarios. The first phase lasted approximately nine months and consisted of Tiburon staff working closely with FPX experts to configure the application and integrate it with the sales force automation tool. CPQ OnDemand's robust functionality accommodated the significant input required to customize the solution for the different type of products, pricing, business rules, etc. What made the work more challenging is the broad range of customer scenarios that Tiburon salespeople come across in the public safety arena.

The second phase of implementation was to train internal staff to use the CPQ OnDemand data management tools so that Tiburon staff could make minor revisions, such as adding products or price changes. The third phase consisted of full rollout of the solution, including having fully trained in-house experts on the solution. These phases lasted from three to six months. The product has been in use for approximately three years, and Tiburon still occasionally works with FPX experts for major configuration changes. At the end of phase three, Tiburon had a pricing and configuration solution that enabled the sales force to develop custom solutions. The business rules incorporated into CPQ OnDemand ensured that all proposals featured the correct product mix and product dependencies.

## **Challenges**

One challenge Tiburon faced in implementing CPQ OnDemand was cultural. Even though the original spreadsheet system was cumbersome, especially when used with the sales force automation tool, people were used to it. So there was initial resistance to implementing the automated system. Also, Tiburon did not include every product in the initial phase of the rollout; therefore, in some cases, salespeople had to work with both old and new systems.

Perhaps the biggest challenge was the sheer complexity of gathering Tiburon's institutional knowledge, which often was not documented but existed only in an experienced salesperson's head. This information was critical to customizing the FPX solution to accommodate the entire range of Tiburon products, options, and business rules.

## **Benefits**

With the CPQ OnDemand implementation, Tiburon now has an automated system for customized pricing and product configuration. The solution helps salespeople make proposals almost instantly, and these proposals can be changed on the fly. Because CPQ OnDemand includes business rules, nothing is left out and proposals are more accurate because they automatically consider product integration and dependencies.

The bottom line is that it is no longer possible for Tiburon salespeople to put together a "bad" quote in terms of the required components for a given customer solution. In addition, the sales force is no longer dependent on the spreadsheet expert to calculate pricing. In effect, everyone using CPQ OnDemand is an "expert." This reduces the time required to put together a proposal, and because CPQ OnDemand is cloud based, it puts the answers at the fingertips of the mobile salesperson in the field, further saving time and strengthening relationships.

The solution also reduces time to train new salespeople. Just knowing the products in Tiburon's markets is not enough. A sales representative also needs to know the complex ins and outs of how numerous products — including those from other vendors — work together, requiring many months of training. But with CPQ OnDemand, this institutional knowledge is now part of the application, meaning that a good salesperson can be productive much sooner.

Also, CPQ OnDemand is integrated with Tiburon's sales force automation system, solving the challenge of getting more use from an already installed product and creating better integration and use of information in the company. All quotes and product configurations are fed into the sales force automation tool, which then increases the body of knowledge about specific customers or prospects. This also provides an online record that can be easily recalled if a salesperson changes territories or leaves the company. This integration also shortens the internal approval process for customer quotes.

## **Methodology**

The project and company information contained in this document was obtained from multiple sources, including information supplied by FPX, questions posed by IDC directly to Tiburon employees, and Tiburon corporate documents.

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