

Software quote to order

Objectives and vision

One of silicon valley's most prominent technology companies was dealing with growing pains associated with rapid expansion.

A significant side effect of this was the increasingly complex "quote-to-order" area of the business. They were paying a steep price for innovation – a proliferation of product codes which made it difficult to accurately quote customers.

The company's CIO wanted to eliminate code complexities and build a scalable quoting process that would ultimately improve the customer experience.

Actions

- Both the client and Proudfoot worked together to reconstruct the product hierarchy by reducing/consolidating the client's 3,200 codes into a searchable quantity
- Once complete, they devised a strategy to integrate the hierarchy into the organization's IT platforms to further enhance its quoting capabilities
- A higher degree of governance over product codes was the result of more hands-on involvement from the executive and finance teams
- The entire quoting process was aligned with strategic priorities and then streamlined by eliminating unnecessary steps
- The quote-to-order team began to operate more efficiently as a result of cross-functional skills learned in training

Results

- The new sales and product development process resulted in a 50% reduction in the amount of time needed for the sales team to generate a quote
- A 48% reduction of product codes eliminated unnecessary steps in the end-to-end process which improved customer satisfaction rates
- Extensive coaching gave workers a sense of accountability and ownership that started a cultural shift toward continuous process improvement



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