

Revolutionizing Service Contract Quotations with Contract Calculator Integration

Discover how Tescan transformed their sales process with a cutting-edge Contract Calculator, seamlessly integrating SugarCRM and QuoteWerks to deliver faster, more accurate customer quotations.

Project Goals

Tescan aimed to:

- **Streamline Service Sales Operations:** Integrate SugarCRM with QuoteWerks for smooth data flow.
- **Automate Pricing Calculations:** Develop a Contract Calculator to simplify complex pricing.
- **Enhance Quotation Accuracy:** Ensure precise and consistent customer quotes.

Key Actions

- **Understanding Needs:** Collaborated closely with Tescan's team to gather requirements and understand their challenges.
- **Design & Development:** Crafted a detailed plan and developed powerful integration tools.
- **Product Integration:** Enabled real-time product updates from SugarCRM to QuoteWerks.
- **Equipment Integration:** Allowed easy import of customer and equipment details.
- **Automated Calculations:** Created a user-friendly wizard to guide Service Sales representatives through contract pricing.
- **Thorough Testing:** Ensured everything worked flawlessly before going live.

Overcoming Challenges

- **Data Accuracy:** Mapped fields meticulously to ensure seamless data transfer.
- **Complex Pricing:** Managed diverse pricing structures for different regions and contract types.
- **User Training:** Provided comprehensive training to ensure smooth adoption.

Results

- **Boosted Efficiency:** Reduced the time to generate quotes by 50%, allowing Service Sales representatives to focus on closing deals.
- **Improved Accuracy:** Automated calculations eliminated errors, ensuring consistent pricing.
- **Higher Satisfaction:** Service Sales representatives loved the streamlined process and intuitive interface.

Customer Testimonial

"The new Contract Calculator has transformed our Service Sales process. We can now generate accurate quotes in a fraction of the time it used to take." - Martin Dostal, Service IT Business Consultant, Tescan

Business Impact

Since implementing the Contract Calculator, Tescan has seen a 50% increase in Service Sales when generating quotes. The streamlined process has given Tescan Service Sales more time to focus on responding to customer enquiries and closing deals.

Expansion

Following the success of the initial project for their US subsidiary, Tescan has rolled out the solution to six other subsidiaries in six different countries. This expansion demonstrates the scalability and effectiveness of the system across diverse markets.

Future Plans

Tescan also plans to enhance the system further with features like dynamic currency conversion to make the quoting process even simpler for the Service Sales team

Conclusion

Tescan's Service Sales process was revolutionized with the new Contract Calculator. The integration of SugarCRM and QuoteWerks not only improved efficiency and accuracy but also enhanced overall user satisfaction, leading to better business outcomes.

Call to Action

Interested in transforming your sales process? Contact us today to learn how our solutions can benefit your business.

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