



Case Study

Oil and Gas High Tech Leader Implements Next Generation Salesforce CPQ, Communities and Service CRM in Multi-vendor Success Model

About the Client:

OSIsoft Software, LLC provides infrastructure software solutions. The company designs, develops, and produces pre-packaged computer software that manages and connects sensor-based data and operations. They deliver the PI System, the industry standard in enterprise infrastructure, for management of real-time data and events. With installations in 107 countries, the OSIsoft PI System is used in manufacturing, energy, utilities, life sciences, data centers, oil and gas, facilities and process industries. Founded in 1980, OSIsoft, LLC is headquartered in San Leandro, CA, with operations worldwide and is privately held.

Products & Services

- Salesforce Partner Community
- Salesforce CPQ
- Salesforce Service Cloud®
- Salesforce Customer Community

Business Challenges

- Complex product configuration
- Renewal pricing and accurate dates (leap year)
- Amendments with multiple quote lines
- Dell Boomi integration and product mapping

Client: OSIsoft Software, LLC

Industry: Computer Software, Enterprise Event Monitoring

Business Requirements

- Salesforce CPQ Implementation
- Product Configurations
- Pricing Rules
- Block Pricing
- Advanced Approvals
- Discount Approvals and Tiers
- Product Bundles
- (PI server) Core Platform with
- add-ons and complex bundles
- New Products Introduction
- Amendments
- Renewals for single and multi-sites
- Transfers
- Professional Services and Services
- Quote Document
- Document varies by transaction
- Order Processing workflow
- Partner Community Implementation
- Partner onboarding
- Products, cases, and services
- Integrated with CPQ
- Partner Support
- Community
- Web
- 24/7 Phone

Project Scope and Overview

OSIsoft has successfully navigated its CRM and enterprise transformation journey, standardizing on the world's leading CRM, Salesforce.com. Jade Global worked with PwC and OSIsoft to deliver key business requirements for a WW Phase 2 engagement. Jade Global conducted a series of demos with key business users, and continuously added value as the main point of contact for explaining business processes.

Jade Global was tasked with taking ownership and charge of the QA process for the project, along with serving as a bridge for all teams involved. Jade tested the integration between SAP and Dell Boomi. Along with testing integrations, Jade created a large Regression Test Case Library, End-to-End Scenarios, Black Box and Negative Scenarios, executed all scenarios, and took ownership of SIT and UAT. There was a heavy focus on creating End-to-End Flows and creating documentation. Jade Global subject matter experts answered all business process related questions from users.

Salesforce CPQ and Partner Community Implementation

Jade Global helped OSIsoft implement a Salesforce Partner Community Cloud, which focused on Partner onboarding and Partner support. Utilizing the Jade Global paradigm for Communities implementation, Jade Global built a robust engagement portfolio for OSIsoft to be consistent with the delivery of new products and maintain an edge over competitors.

As a Salesforce CPQ customization and implementation partner, Jade Global performed the following processes for OSIsoft:

- Contract Creation and Management
- Product and Price Book Configuration
- Optimize Product Selection Process
- Quote Document and Order Processing
- Product Bundles

The Benefits

- The entire company functioning as a single and cohesive organization
- Efficient and precise communication Training and small group sessions increased user adoption from 25% to 75% by project end
- Discount automation help sales reps gain business and close the quotation with less hassle time
- Improved discount approval process
- Role hierarchy implementation

Commitment to Shared Success

OSIsoft relied on Jade Global to create business process documentation and support by facilitating demos. Jade Global took ownership of the SIT and UAT periods. Jade Global worked with SAP and IT owners to ensure test scenarios were fully covered. As a result, OSIsoft experienced Improved interaction and relatively no gap between business owners, PwC, and Jade Global. OSIsoft trusted Jade Global to perform all QA activities, and continues to work with Jade Global on other shared projects.

Contact us to know more about our Salesforce services →

