

Products



Industry

Technology – Digital Media

Profile

New Energy Group is an enterprise solutions provider specializing in SAAS digital marketing, sales enablement and customer service applications. New Energy Group also provides a full suite of technology consulting services to help their customers improve operations and customer satisfaction.

Company Size

450 Employees

Location

Italy & Spain



Project Billing

Project Financials

Project Invoices

Payments

Criteria

Template

Last Month Charges

Project

Billing Date

Last Month

Charge Type

Time Entry Person

Account

Revenue Type

Approved to Invoice?

Is Invoiced?

No

Records

<

Home

Accounts

Opportunities

Projects

Project Resources

Project Financials

Project Pulse Setup

Reports

Alerts

Opportunity Wizard - IBM PP

Save

Back

Project Details

Start Date

2/23/2016

2/5/2016

Project Name

IBM PP - 2/5/2016

Record Type

Time & Material

Line Items

| Include? | Description | Service? | Billable? | Template |
|-------------------------------------|--|-------------------------------------|-------------------------------------|------------------------|
| <input checked="" type="checkbox"/> | Customization services. | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Template - Customiza |
| <input checked="" type="checkbox"/> | Implementation Services - Accounting Integration | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Template - Accounting |
| <input checked="" type="checkbox"/> | Project pulse user license | <input type="checkbox"/> | <input checked="" type="checkbox"/> | |
| <input checked="" type="checkbox"/> | Implementation services - Project Pulse | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Template - Project Pul |
| <input checked="" type="checkbox"/> | Project Pulse Finance user license | <input type="checkbox"/> | <input checked="" type="checkbox"/> | |
| <input checked="" type="checkbox"/> | Annual support - Project Pulse | <input type="checkbox"/> | <input checked="" type="checkbox"/> | |

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Accounts

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Project Pulse Setup

Reports

Dashboards

Chatter

Query Panels

Data Loader

Grid

Vacations

Opportunity

IBM PP

Customize Page

Edit Layout

Printable View

Help for this Page

Show Feed

Back to List: Custom Settings

Products (Standard Price Book)

Contact Roles

Open Activities

Activity History

Notes & Attachments

Engagements

Stage History

Opportunity Detail

Edit

Delete

Clone

Sharing

Project Wizard

Opportunity Owner

Opportunity Name

Account Name

Type

Primary Campaign Source

Jeff Kennedy

IBM PP

IBM

Stage

Probability (%)

Close Date

Project Start Date

Quantity

Amount

Negotiation/Review

90%

11/2/2015

55.00

\$53,050.00

Edit

Delete

Clone

Sharing

Project Wizard

Products (Standard Price Book)

Add Product

Edit All

Choose Price Book

Sort

Products (Standard Price Book)

Help

| Action | Product | Product Code | Quantity | Sales Price | Total Price | Is Service |
|------------------------|-------------------------------------|--------------|----------|-------------|-------------|-------------------------------------|
| <a>Edit <a>Del | Accounting Integration | SRVG | 1.00 | \$20,000.00 | \$20,000.00 | <input checked="" type="checkbox"/> |
| <a>Edit <a>Del | Annual support - Project Pulse | SLP | 1.00 | \$5,000.00 | \$5,000.00 | <input type="checkbox"/> |
| <a>Edit <a>Del | Customization Services (Pro) | SRVG | \$0.00 | \$225.00 | \$11,250.00 | <input checked="" type="checkbox"/> |
| <a>Edit <a>Del | Project Pulse (Annual User) | LIC | 1.00 | \$720.00 | \$720.00 | <input type="checkbox"/> |
| <a>Edit <a>Del | Project Pulse Finance (Annual User) | LIC | 1.00 | \$1,080.00 | \$1,080.00 | <input type="checkbox"/> |
| <a>Edit <a>Del | Project Pulse Implementation | SRVG | 1.00 | \$15,000.00 | \$15,000.00 | <input checked="" type="checkbox"/> |

Improved Revenue Forecasting & Advanced Project Management in Salesforce

THE CHALLENGE

- New Energy's Enterprise Solutions Group was experiencing operational challenges in delivery of professional services due to use of spreadsheets other disconnected applications.
- Lacking visibility into resource capacity and availability made project staffing difficult and led to project delays due to over-scheduled resource assignments.
- Sales reps had difficulty creating profitable quotes and honoring customer commitments for project start date.
- Lack of communication between team members led to mistakes, confusion and rework.
- Manual processes increased operational costs and led to delayed customer billing.
- Management lacked visibility into the operational and financial health of the business.

THE SOLUTION

- Implemented Project Pulse, which provided a complete professional services solution supporting Sales, Service Delivery, Financials and Billing.
- Project Pulse was customized extensively for New Energy's unique requirements. We created a custom revenue model which combined the benefits of fixed price contracts with progressive billing.
- To support advanced resource forecasting capabilities, we implemented real-time capacity calculations that enabled management fine-grained visibility into resource forecasting and customized our resource utilization views to provide additional flexibility to support project staffing.
- Configero developed custom functionality to support New Energy's unique requirements for revenue splitting among related Opportunities.

THE RESULTS

- New Energy achieved its goal of eliminating application silos, streamlining, integrating and automating key business processes across Sales, Service Delivery, Financials, Billing & Support
- Automation of manual processes related to project creation, billing and financial operations has dramatically increased operational efficiency and eliminated errors and rework.
- The professional services team has a state-of-the-art solution that empowers their project managers and staff to focus on customer satisfaction.
- Executives have real-time enterprise visibility into the operational and financial health of the business allowing management decisions to made with confidence.
- Quality of customer services has greatly improved and project teams now work in a collaborative manner.

