Based out of Newport Beach, California, Planet DDS is a pioneer of cloud-based dental software products that have revolutionized the domain of dental practicing. They have introduced Denticon, the practice management software, which is a powerful tool trusted by thousands of dental professionals across the US. For over a decade, Planet DDS has thrived by helping their clients grow the top line and cut down expenses with game-changing practice management software.

Challenges faced by the client

Client's Denticon is a powerful and very popular management tool for dental practitioners across the US. Planet DDS's Sales team offers a variety of different packages and discounts to its customers. Due to the varying budgets and requirements of different dental practitioners, Planet DDS sales team would offer different discounts and feature enhancements, customizing the price and package for each customer.

As the Sales team was giving out different discounts, and there were different price books created for different customers, different baseline pricing and different uplifts applied for each customer, it was getting very complicated to keep track of actual bookings and ROI.

Since all these price and package customizations happened out of the CRM, the Sales team was finding it difficult and tedious to track and monitor all of these in various word and excel documents and feeding these manually to the finance apps.

Our Solution

- ✓ DemandBlue team provided **advisory services** and gathered what the pain points of the Sales and Finance team were. They assessed and suggested that they needed a proper system to handle bundle packaging, baseline pricing, standardizing discounts and approvals, systematic signatures on contracts and seamless flow to the finance applications.

- ✓ To address these pain points, DemandBlue **installed Salesforce CPQ** and configured product bundles and features like discounts, Up Sell, Cross Sell and so on in the sandbox and later moved it to production.

- ✓ We **segregated the bundles** according to different industry types, base prices, combination of services, and other parameters. A standard price book was created and all products and bundles were added to this price book, with a baseline list price.

- ✓ We added three different **levels of approvals** to track differently sized discounts to go via the proper authority and approval.

- ✓ We also **integrated DocuSign** for final signatures by the client.

✓ Our development team also **automated different processes** like product bundling, contract creation, creation of renewal quotes with 4% annual uplifts, amendments, segregating booking and billing opportunities and much more.

✓ Lastly, we added **price rules**, **alerts** and error messages depending upon product dependencies.

✓ DemandBlue team also facilitated the **migration of historical contracts** into Salesforce and the finance application.

✓ DemandBlue team **configured the defaults**, **fields and process builders** required to sync over the contracts and products over to the finance system.

Benefits

- **Bundling the Denticon products caused the Sales to rise by 47%.**
- **Planet DDS's overall ROI increased by 30%.**
- **Decreased quoting time by 27%.**
- **Employee satisfaction and morale improved tremendously.**
- **Standardization of discounts and sales processes improved process efficiency.**
- **Because of prompt and accurate responses, customer satisfaction level rose by 12%.**

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