atg advanced technology group
A **Cognizant** Company.

COMPASS CPQ, CLM IMPLEMENTATIONS
IMPROVE ONBOARDING PROCESS

COMPASS

Compass is a disruptor in the real estate industry, pairing the industry's top talent with technology for an improved customer experience.

INDUSTRY: REAL ESTATE
SERVICES: BROKERAGE
HQ: NEW YORK, NY
WEBSITE: COMPASS.COM

BUSINESS CHALLENGE
SUMMARY

While Compass was a technology-forward company in the buying and selling experience, the support systems were not optimized to support Compass' growth.

Limited automation resulted in lack of data integrity and labor-intensive manual processing which put a strain on Compass' ability to:

- Efficiently execute and manage agent contracts
- Automate the handoff to Agent onboarding
- Ensure the accuracy of agent compensation
- Provide accurate reporting on agent data

These inefficiencies, along with limited standardization of agent compensation offerings, resulted in added cost to the business during both the recruiting and ongoing support phases of the agent's lifecycle with Compass.

The business model required some advanced concepts in Q2C:

- Product catalog that did not always involve pricing
- Unique approach to profitably calculations
- Robust order management

The solution needed to be future-proofed to support agent-facing eCommerce functionality on the roadmap.

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Great work everyone! This is the biggest change ever made to the way Compass recruits agents and the foundation for everything we've planned in our roadmap in 2018.

Karim Jiwani
Sr. Product Manager
Compass

ATG
SOLUTIONS & TOOLS

ADVISORY SERVICES

Defined the future state architecture

Contributed to vendor selection for components of that architecture

IMPLEMENTATION SERVICES

Enhanced Compass' previous Salesforce implementation

Drove implementation of CloudSense, SpringCM, and DocuSign to further improve Compass's processes

RESULTS & IMPACTS

ATG streamlined Compass's CPQ process and enabled consistencies across contracts and automated approvals.

Through the integration between CloudSense and SpringCM, ATG automated the generation of contracts, designed a process to ensure data integrity between SFDC and the contract, and laid a foundation for data integrity across all systems.

The new, improved system automated the signature process and supported simplification of language, resulting in reduced time to execute.