AUGUST 2024

POET'S CORNER

POET
Pricing & Order Entry Transformation

NEWSLETTER

We are back with our newest edition of the POET Newsletter! POET's development, capabilities, enhancements and enrichments continue to charge ahead as summer winds down.

THIS MONTH'S MUST-READS:

☑ **POET Program Update & POET Spotlight:** See how your colleagues interact with POET and have helped shape its development!

☑ **Salesforce CPQ Demo:** Come see what a long-distance quote will look like in the new system!

Virtual Scavenger Hunt

HOW MANY VIDEOS ARE IN THE POET RESOURCE CENTER?

Send your answer to POET@pods.com for a chance to win 100 Blue Door coins!



POET Program Update

NEED-TO-KNOWS

- **Availability Calendar** — View more than just Sold Out Days — see exact counts of jobs and premium services available each day
- **Order Modifications Tracking** — View history of any changes made to an order after it was initially placed
- **Trigger Customer Communications** Send labor referral, order cancellation and order modification emails to the customer
- **Forms** – Upload documents related to the customer's move

July Usability Testing

Sales and Service agents across Residential and Commercial came together to search for accounts, convert quotes to orders and perform order modifications. They practiced updating driver notes, adding payment information, modifying PO numbers and cancelling orders.

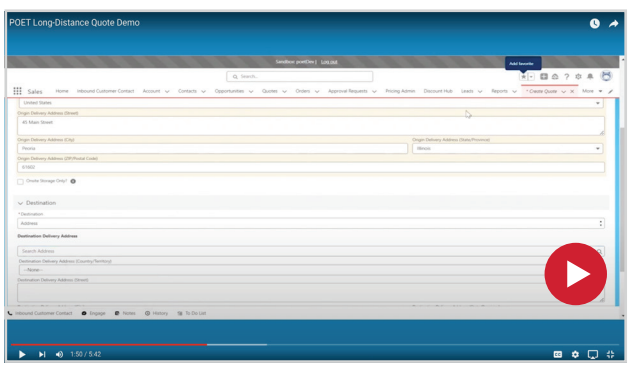
Did You Know?

POET (Price and Order Entry Transformation) is the name of the project where we will replace Order Entry with Salesforce CPQ; Pricing Admin will be replaced with PROS

Salesforce CPQ (Configure, Price, Quote) is a Salesforce tool that associates will use to place and modify residential and commercial customer orders

CPQ For You! Creating IF Quotes

Our newest POET Resource Center demo video shows how you can create a long-distance quote using Salesforce CPQ!



POET Spotlight

YOUR VOICE MATTERS!

Practice Makes Perfect!

Over the past month, "Practice with POET" sessions were held with three functional groups: SSC trainers, Learning & Development and Revenue Management. These sessions allowed users to gain hands-on experience in the new system, increase their understanding and comfort with CPQ, and ask questions!

Janet Tripolino, Trainer II – SSC Ops



"Using POET to build quotes and convert them to orders is very intuitive, featuring easy-to-follow formatting with helpful scripting and disclosures. What excites me the most is the ability to switch between screens without losing information! This flexibility lets you adapt to changes in the conversation seamlessly, allowing you to navigate back to your previous point for a smooth interaction with the customer with no system errors."

Ra'Lette McGhee, Facilitator III – L&D



"POET's in-work-flow guidance makes the system easy to use and even easier to train. We believe the scripting and data integration features will greatly improve our processes here at PODS. The EY team was also wonderful to work with—they provided scenario-based, hands-on training and were more than willing to answer our many, many questions! We're looking forward to rolling out this technology across the organization!"

Garrett Ferguson, Analyst II – Pricing



"Thank you to Hannah, John, and Lauren for taking the time to sit down with us! We enjoyed being able to break the system and learn about POET's benefits and limitations: the Quote Page structure is clear, the ability to drill down on each Service Leg and see what inputs and discounts created each price is very helpful. The Customer Account Page holds all quotes a customer has, which is also very helpful when comparing quotes. And the Discount Hub is also very beneficial; creating a discount is super easy and the guided experience is very smooth. We are looking forward to our next practice session and the launch of POET next year!"

Let's Build POET Together!

Have an idea or suggestion that would elevate POET's capabilities? Or a desire to further understand current POET implementations? Then we want to hear from you! Send us your content, questions and ideas to POET@PODS.com for a chance to win 100 Blue Door Coins — all questions, answers and implementations will be acknowledged, posted and addressed on the POET Resource Center's **Q&A tab.**

Q: "Hello Team, our team processes donations (including Toys for Tots). In POET, I've noticed the "order type" donations, is not yet an option in the sandbox. Just wanted to make sure this will be added at some point — thanks!"

A: "We have met with the Marketing team to understand the current state for donation containers and will be designing the solution to fit the needs between SST and Marketing. The ability to create donation quotes will be restricted based on assigned permission sets."

Milestones

Recently Completed Milestones:

- July Usability Testing Sessions
- Practice with POET" Sessions with SSC Trainers, Learning & Development and Revenue Management
- August Change Network Meeting

Upcoming POET Milestones:

- September Change Network Meeting
- Service "Practice with POET" Session

July's Blue Door Coin Winner!

Daniel Ogburn — POET Go-Live Modules Winner!

PODS®

Need More?

POET Resource Center: Your one-stop shop for training, contact info for superusers, and Change Champions.

Got questions? Shoot us an email at **POET@PODS.com**. We'll answer and post your Q&A on the POET Resource Center!