SEPTEMBER 2024

POET'S CORNER

Pricing & Order Entry Transformation

NEWSLETTER

We are back with our newest edition of the POET Newsletter! POET's development, capabilities, enhancements and enrichments, sculpted by you, are shaping up for training as we transition into fall!

THIS MONTH'S MUST-READS:

☑ **POET Readiness Survey:** Before training takes off, we want to know how you've prepped for POET!

☑ **Salesforce CPQ Demo:** See how to convert a customer's quote into an order using Salesforce CPQ!

Virtual Scavenger Hunt

HOW MANY POET NEWSLETTERS HAVE WE SENT (INCLUDING THIS ONE)?

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

POET Program Update

NEED-TO-KNOWS

POET's most recent technical build, installed over the past few weeks, heavily focuses on **Order Modifications**. The following modifications have now been built:

- **Cancel an entire order**
- **Cancel a container**
- **Modify additional (ancillary) items**
- **Modify protections**
- **Schedule dates**
- **Change delivery address**
- **Add agent adjustment (discretionary discount)**
- **Add service leg**
- **Add fee**

Looking Forward — POET Key Enhancements

Check out a few of POET's enhanced workflows designed to boost efficiency and simplify your work!

Simplified agent experience:

- All customer account, quote and order information is now stored within Salesforce CPQ!
- Improved visual indicators and scripting are embedded in the tool, streamlining agent conversation.
- Enhanced user flexibility now allows you to move from screen to screen *without* losing information previously entered.

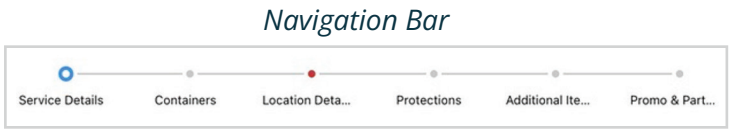
Improved customer experience:

- Customer interactions and history with PODS are now consolidated into a single, easy-to-view display
- A new feature enables stacking multiple discounts, giving customers the best possible price.
- POET will automatically identify required move forms, proactively communicating expectations to customers.

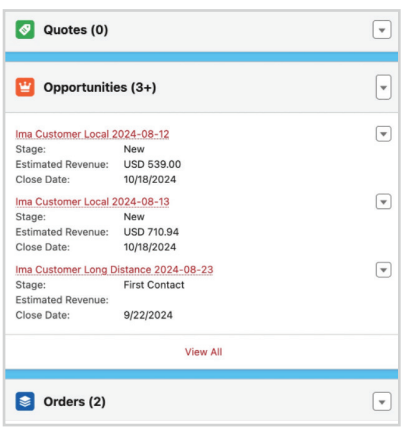
Increased quality of downstream information:

- POET will provide flexible dates for customers, helping prioritize reschedules.
- Automated detailed drivers' notes will adequately prepare the field to deliver the best possible service to customers.
- All calendar overrides and order modifications will be clearly documented in POET, making order history easier to understand.

Navigation Bar



Customer History with PODS

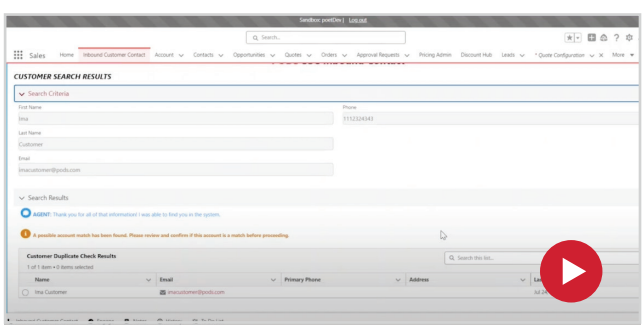


Flexible Dates



CPQ For You! Converting a Quote to an Order

Our newest POET Resource Center demo video shows how you can convert a customer's quote into an order using Salesforce CPQ!



POET Spotlight

YOUR VOICE MATTERS!

POET Perspective? Tell Us Yours!

The Employee Voice "POET Readiness Survey" was sent to all Salesforce Users on September 23. This survey aims to capture your current thoughts and feelings about Project POET before training officially begins. Please take a few minutes out of your day and let us know your thoughts by Oct. 4!

Let's Build POET Together!

Q: "Hello, regarding the GMF (aka Spongy Moth form): Commercial utilizes a different one than the rest of the business. Will this be available as a document to send out to customers, or will this need to be manually emailed to the customer, as is current state?"

A: "The Commercial Spongy Moth form will be tracked in Salesforce CPQ as a required document for commercial orders that meet the specified criteria. Once the order is booked, Salesforce CPQ will email the form to the customer for completion (print & wet signature)."

Have an idea or suggestion that would elevate POET's capabilities? Perhaps 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.*

Milestones

Recently Completed Milestones:

- September Change Network Meeting

Upcoming POET Milestones:

- Corp Ops, Inbound Service, AR, ART, Ops Support and Advocacy "Practice with POET" Session
- October Change Network Meeting

August Blue Door Coin Winner!

Erin Justason — POET Resource Center Video Count

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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!