



BUSINESS CASE STUDY 4

Broker Management & Channel Control

Bringing order, accuracy and transparency to a rapidly expanding broker channel



Presented by:
Dr Bob Burns

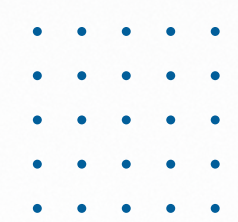


Background



A retailer whose customer growth was overwhelmingly broker-driven found itself struggling under the weight of inconsistent submissions, duplicated contracts, and ongoing commission disputes.

Each broker worked differently, using its own templates, its own quoting logic, and often its own interpretation of tariff structures.



The Issue

Internally, the retailer relied on spreadsheets to keep track of new opportunities, submitted contracts, renewals, and commission obligations. As volumes increased, so did confusion.



Some customers were on-boarded under the wrong commission arrangements, while others appeared multiple times under slightly different terms.

Disputes became commonplace, and the administrative burden was draining time from both operational and finance teams.



Edge Broker Module

Cloudwater Edge introduced structure where previously there had been chaos.

The Broker Module standardised the entire contract lifecycle—from quote creation to customer transfer to billing commencement.

Brokers received access to a controlled environment where rates, contract templates, and pricing were always up to date.

Every submission followed the same workflow, and every contract carried a clear audit trail.

The screenshot displays a web form titled "Quotation Data" with various input fields and controls. The form is organized into two columns. The left column includes fields for "Duration from" (28/03/2023), "Margin (%)" (0), "Contract Length (Months)" (12), "Monthly AMR Costs", and a toggle for "Include Contract Page" set to "YES". The right column includes fields for "Duration to" (28/03/2024), "Associated Broker" (Test Broker 1), "Payment in Advance (term)" (N/A), a toggle for "Include Retail Default" set to "NO", and a toggle for "Include Payment Plan" set to "NO". Each dropdown menu has a blue 'x' icon to clear the selection.

Field	Value
Duration from	28/03/2023
Duration to	28/03/2024
Margin (%)	0
Contract Length (Months)	12
Associated Broker	Test Broker 1
Monthly AMR Costs	
Payment in Advance (term)	N/A
Include Contract Page	YES
Include Retail Default	NO
Include Payment Plan	NO

Results

For the first time, both the retailer and its brokers could see the same pipeline data in real time: which contracts were pending, which were approved, and which required action.

Commission calculations were applied consistently and automatically, eliminating the risk of over-payment and removing the ambiguity that once caused friction.

The impact was immediate. Disputes collapsed. Conversion rates improved as brokers gained clarity and confidence in the quoting process.

The retailer regained control of its margins and could forecast its pipeline with far greater accuracy.

“Edge added professionalism and structure to our broker channel. It reduced disputes and improved conversion rates.”

