

# SALESFORCE CPQ ENHANCEMENTS AUTOMATE PROCESSES, MITIGATE ERROR



INDUSTRY: SOFTWARE  
SERVICES: INFRASTRUCTURE

HQ: SAN FRANCISCO, CA  
WEBSITE: hashicorp.com

## BUSINESS CHALLENGE SUMMARY

ATG was engaged to enhance the existing HashiCorp Salesforce CPQ, resulting in:

- Optimization and improvement of approval processes
- Consolidation and automation of quote templates
- Enhancements for pricing and discounting
- Proper automation of amendments and renewals to help with forecasting
- Implementation of DocuSign for e-signature
- Improve the functionality around Partner Quoting processes

## ATG SOLUTIONS & TOOLS

**Implementation Services:** ATG implemented Advanced Approvals

**Implementation Services:** ATG implemented DocuSign

**Implementation Services:** ATG enhanced the existing HashiCorp Salesforce CPQ

## RESULTS & IMPACTS

- Implemented approximately 50+ new approval rules for compliance and controls in accordance with company policies and approval matrix for reduction of inconsistent and manual approval request routing.
- Improved Approval Email Templates to provide the approvers a comprehensive view of the required information (discounts, deal overview, business justifications and special terms) to make an informed decision about approving or rejecting quotes
- Consolidated their Quote Templates from 10+ to 2 and allowed for dynamic customer and product information to be passed to the output documents to ensure accuracy and proper documentation controls.
- Implemented DocuSign for e-signature and this also allowed for radio buttons to be used to have the customer identify whether a PO is required or not for their transactions with HashiCorp to align with finance requirements for proper bookings and accounting practices.
- Provided a custom solution for target pricing on a per line or a subset of Quote Lines and has had the highest impact on the Sales team to allow flexibility and enhanced functionality to increased precision in pricing and reduce the "guess work" for pricing and remove the need to step outside the system for spreadsheet calculations that are at risk for user errors.
- Turned on the automation of Contract Amendment and Auto-Renewal processing which reduced manual processing that is subject to error
- CPQ Enhancements provided to increased functionality related to partner / reseller transactions to eliminate incorrect partner discounting, automate approvals related to partner transactions and generate the proper output documents