

SALESFORCE CPQ IMPLEMENTATION & INTEGRATION MOVE TECH COMPANY TO VALUE-BASED SELLING MODEL

The client is an American producer of computer memory and computer data storage including dynamic random-access memory, flash memory, and USB flash drives.

INDUSTRY: TECHNOLOGY
SERVICES: SEMICONDUCTORS & MEMORY

BUSINESS CHALLENGE SUMMARY

The client needed to overcome revenue leakage due to their cost-based selling model. They employed multiple quoting processes and systems, causing sales inefficiencies, quoting inconsistencies, and a poor sales user experience. Their legacy systems included:

- Price Driver (Apttus and other custom-built solutions and integrations within SFDC)
- Direct Quote (Custom Quoting system built within SFDC)

These factors contributed heavily to a lack of rigor in how products were priced and sold to customers.

ATG SOLUTIONS & TOOLS IMPLEMENTATION SERVICES

Using the ATG Atlas Framework™, implemented Salesforce CPQ with Advanced Approvals and Advanced Approvals Enablement package.

Utilized Dell Boomi to build:

- Integration between Salesforce CPQ and SAP Order Management
- Integration between Salesforce CPQ and RPM (the client's data science platform to feed pricing guidance to CPQ)
- Integration between Salesforce CPQ and Microsoft Azure

Also implemented the following:

- Quote Calculator Plugin (QCP)
- Custom Account Management tool for quote creation
- Custom Quote Helper tool for guided quoting and sales processes
- Microsoft Azure

RESULTS & IMPACTS

Optimized Quote Management System - field sales creating and delivering approved quotes to direct customers from a single quote management system.

Reduced Approval Cycle Time - each business unit can easily review, adjust, approve, and track quotes resulting in reduced approval cycle time.

Streamlined Order Management System - orders are processed in referenced to quote terms and conditions.

Improved Business Performance Reporting - cross-organizational teams can drive and influence improved business performance due to a data-driven process.

Transitioned the client from a cost-based selling model to a value-based selling model to improve sales and revenue.

Implemented Salesforce CPQ as single quoting tool make the sale and quoting experience more consistent for sales users.

Built a custom quote creation and guided selling tool to make the quote creation and delivery process more efficient and reduce the number of clicks for sales users.

Integrated Salesforce CPQ with the client's custom-pricing guidance tool to allow sales users to make data-driven pricing decisions.

Integrated Salesforce CPQ with SAP order management to streamline the sharing of quoting data for order management purposes.

Integrated Salesforce CPQ with Microsoft Azure to ensure only authenticated users were able to access sensitive pricing data.

Implemented Salesforce Advanced Approvals and custom approval to enforce pricing guidance principals and reduce revenue leakage.