

SALESFORCE CPQ IMPLEMENTATION SPAWNS FULL AUTOMATION

The client provides businesses with collaboration software and solutions to create team efficiency, effectiveness and scale. Their core service offerings are primarily used to assign tasks, track project progress, manage calendars, share documents, and manage other work, using a tabular user interface.

INDUSTRY: TECHNOLOGY

SERVICES: SaaS - COLLABORATION TOOLS

BUSINESS CHALLENGE SUMMARY

- The client engaged ATG to design and implement Salesforce CPQ and Advanced Approvals for their rapidly growing business.
- The client needed an optimized quoting solution to replace their existing custom-built Sales Cloud CPQ solution.
- Their company's growth required a CPQ solution that was scalable and could support future-state offerings, use cases, and sales strategies.
- Their CPQ solution also needed to keep up with their high growth environment which saw 2x revenue and 4x users within a two-year timeframe.
- The client wanted to make sure their customers experienced little to no impact related to the implementation. This required a very complex data migration of in-flight deals.

ATG SOLUTIONS & TOOLS IMPLEMENTATION SERVICES

- Using the ATG Atlas Framework™, ATG implemented Salesforce CPQ with client's custom E-Commerce Portal leveraging Salesforce APIs.
- The custom process enabled online e-commerce transactions to be submitted through an API call. The API call creates the opportunity and goes through the entire CPQ order process before an opportunity is closed/won, all without any manual steps by the client.
- Validation Rules and Approval Rules were implemented to optimize the client's complex selling scenarios and enforcing proper guardrails for the sales rep.
- A large and complex data migration was performed to ensure the client's customers had a seamless experience for any in-flight quotes, renewals, and amendments.
- Large configurable bundles were enabled to support optimization of the client's product catalog.

RESULTS & IMPACTS

- Successful go-live and global rollout of Salesforce CPQ and Advanced Approvals within an 18-month period.
- Fully automated, end-to-end quoting process starting from custom e-commerce portal all the way through ordering in Salesforce.
- Custom integration to support Salesforce CPQ transactions passed to NetSuite Billing for downstream processes.
- Standardization of the client's approval processes reduced average deal cycle.
- Optimization of the client's product catalog resulted in ability to go-to-market quickly with new offerings.
- Improved amendment and renewal processes created a better user experience resulting in a better customer experience.
- Data Migration that included the transformation of over 1 million subscriptions, 200K contracts, opportunities, and in-flight quotes.