



# 25% Increase in Sales Revenue with E2E Automation of Quote-to-Cash Process Powered by Conga

## INSIGHT

A leading cloud-based technology company relied on a well known ERP, Excel spreadsheets, and ShareFile to run their quote-to-cash process (quoting, pricing, approvals, and contracts), which caused high incidence of errors, and duplicate data entry and updates.

Forsys offered a full range of assessment and advisory services to streamline the client's quote-to-cash processes, and CPQ and CLM implementation journeys, which included devising and planning a strategy roadmap, reviewing existing processes, identifying pain points and deviations from industry best practices, assessing organizational readiness for the transformation, and addressing pain points through change management. As a result, the client recorded 25% increase in sales revenue, 30% improvement in win rate, and more than 20% jump in overall deal size.



**Industry**  
Software Development



**Revenue**  
\$250+ M



**Employees**  
450+



**Headquarters**  
California, US

## BUSINESS CHALLENGE

The technology company leveraged multiple independent systems, such as Excel spreadsheets, NetSuite ERP, and ShareFile, to manage its back-office operations. The quotes were manually generated, and the products were set up in NetSuite without any differentiation in pricing by the product description on the contract. Part of the challenge was finding a solution that worked with the team and standardized the process for product lifecycle management.

The critical challenges faced by the client:

- Usage of Excel spreadsheets to manage products and items sold standalone.
- Designing of configurations by sales reps.
- No central location to store product master data.
- Pricing data saved in Excel spreadsheets, Word docs, and Confluence.
- Manual management of promotions, standard discounts, price changes, renewals, terminations, and cancellations.
- Lack of visibility and alerts to the services team to launch the implementation after signing the agreement.
- Usage of phones and emails for approvals.

## TRANSFORMATION JOURNEY

Forsys provided assessment and advisory services that included end-to-end management of quote and invoice automation, contract creation, and product lifecycle with Conga CPQ and Conga CLM.

The key highlights of the transformation journey:

- Designing and creation of Quote-to-Cash process automation using Conga CPQ and Conga CLM
- Assessment and evaluation of the AS-IS state, analysis and presentation of the findings, and planning an adoption approach and alignment with the stakeholders.
- Defining the automation process for quoting, pricing, renewals, and contracts from scratch.
- Recognizing and devising plans for data migration and integration.
- Impact analysis, creation, and implementation of change management roadmap, and rolling out best practices.
- Execution of the deal approval process with Conga IWA.
- Bi-directional integration between Conga CLM and NetSuite.

## ABOUT THE CLIENT

The client has been creating innovative technologies that transform the way financial institutions operate by solving complex problems with streamlined, user-friendly solutions. Their robust and secure technologies empower lenders and consumers to get reliable, accurate information every time, at any time.

## SOLUTION COMPONENTS

Conga CPQ, Conga CLM, Conga Billing, Conga IWA, NetSuite, JIRA

### IMPACT



**Faster time to quote by 38%**



**Increase in overall deal size by 22%**



**Improvement in win rate by 30%**



**Jump in sales revenue by 25%**



**Higher contract accuracy by 45%**



**Rise in contract compliance by 43%**



**Faster contracting process by 42%**



**360-degree view of the entire contract lifecycle.**