



# 60% Surge in Quote Accuracy for a Software Firm with Modernization of Lead-to-Quote Process Using Salesforce CPQ

## Insight

A notable player in the SaaS space aimed to enhance global brand customer experiences but used a mix of tools for sales, causing inaccuracies and disjointed operations. Their inconsistent use of CRM, a custom quoting tool, and Excel led to data redundancy across systems, complicating and lengthening deal closures.

Forsys revamped the client's sales by introducing Salesforce CPQ, streamlining the lead-to-quote process, and simplifying product setup. This reduced reliance on older systems, improved price book management, and led to a 40% shorter lead-to-quote cycle, a 60% boost in quote accuracy, and 50% business process automation, among other gains.



Software Development



~60+ M



500+



Gurugram, India

## Business Challenge

The strategic merger of the client's company with a preeminent customer engagement platform led to an increased urgency to simplify the lead-to-quote process. This process was essential for the amalgamation of their varied product and service offerings and for constructing a scalable system capable of meeting the business demands of the newly integrated entity. The task at hand was to harmonize operational efficiency with scalability, all while seamlessly integrating the offerings from both companies without impeding ongoing business operations.

The client leveraged Salesforce for opportunity management, alongside various other tools like TMS, SugarCRM, and Excel spreadsheets for the quoting process.

The client had to deal with a number of significant challenges, comprising:

- Redundancy and delays in the sales process due to the use of a multitude of platforms.
- Lack of consolidated product and price master data hindered maintaining platform-wide consistency and accuracy
- SugarCRM's restricted flexibility necessitated major customizations due to a lack of provisions for complex product setups
- Absence of efficient data governance and workflows led to increased inconsistencies and operational inefficiencies
- Insufficient structured workflow and data management led to potential revenue drains, negatively impacting profitability

# Transformation Journey

Beginning with a detailed discovery phase, Forsys identified challenges and areas for improvement in the client's existing processes. We utilized our transformation capabilities to develop a Salesforce CPQ solution, custom-tailored to support the client's unique business processes. The solution, deployed via a strategic, phased rollout, successfully standardized the quoting process, product setup, and pricing, streamlining the client's operations.

Here are the key highlights of the implementation:

- ✓ Consolidation of the quoting process from multiple systems into one unified Salesforce CPQ solution
- ✓ Standardization of opportunity management processes
- ✓ Facilitation of the configuration of complex products and bundles
- ✓ Implementation of component-specific discounts
- ✓ Creation of price books in multiple currencies
- ✓ Integration of an advanced approval workflow mechanism to accommodate multiple-tier approvals
- ✓ Deployment of contract management to manage amendments and automate the renewal process
- ✓ Optimization and improvement of the customized modules tailored to the client's unique processes
- ✓ Execution of process automations and validations to eliminate redundancies and manual processes

## Impact



**50% automation of the business processes**



**40% reduction in the lead-to-quote cycle time**



**60% improvement in quote accuracy**



**Shorter time to market for introducing new offerings**



**15% revenue jump through upsell & cross-sell opportunities**



**~80% enhancement in customer satisfaction scores**



**50% decline in manual processes**



**Automation of discounts based on product configuration and pricing rules**

## About the Client

The client offers a customer experience platform that helps enterprises of all sizes to connect, serve and support their customers. Founded in 2003 with a vision to build world-class Enterprise products from India, and rebranded in 2010, it is a powerful and highly flexible one-stop solution for all contact center needs that lets businesses have personalized interaction with every customer across multiple channels, thereby driving customer engagement.

## Solution Components

Salesforce CPQ and Salesforce Advanced Approvals