



Over 30k Reduction in Product Proliferation with Order-to-Cash Optimization Resulting in Touchless Order Process

Insight

A leading provider of enterprise open source solutions wanted to streamline and optimize its existing Order-to-Cash process due to challenges like the inability to create competitive quotes, inaccurate invoices, delayed payments, etc.

Forsys engaged with the client to offer assessment & advisory expertise, which comprised discovery, analysis, and assessing current processes and systems to document the 'as-is' state; designing and reviewing the 'to-be' processes; and creating the CPQ & CLM implementation roadmap. As a result, the client drastically reduced product proliferation from 36K to 3K+ and price list proliferation from 200+ to 15+.



Industry

Software Development



Revenue

\$1+ B



Employees

19k+



Headquarters

North Carolina, US



Business Challenge

As a scaling organization, the absence of a standardized and accurate Order-to-Cash process impacted SFDC adoption, delayed quoting, caused issues in contract visibility and operational efficiency, hindered order & invoice processing, and hampered the ease of doing business.

Moreover, the process of advancing sales from lead to close and converting revenue to cash was slow, complex, and relied on manual intervention, which risked sales, delayed revenue, and cash flow.



Transformation Journey

Forsys provided E2E assessment & advisory services to optimize the Order-to-Cash workflow, which included:

- ✓ Documented the as-is & to-be state (process, systems & data architecture) for Conga CPQ & CLM
- ✓ Drafted the requirements & use case inventory for Conga CPQ & CLM
- ✓ Created high-level functional & technical design for Conga CPQ & CLM
- ✓ Confirmed CRM readiness & validated pre-requisites are in place (master data, etc)
- ✓ Planned sprint for below-the-line (BTL) customers.
- ✓ Mapped out resource use.
- ✓ Designed high-level change management & cut over strategy for Conga CPQ & CLM
- ✓ Identified and suggested risk management strategy
- ✓ Outlined the change request process.



Impact

Forsys enabled the client to optimize its quote-to-cash process with Conga CPQ & CLM, which allowed:

- Reduction in product proliferation from 36K to 3000+
- Lowering of price list proliferation from 200+ to 15+
- Automation of orders & reduction of Quote-to-Order errors
- Bringing down the order touch rate and order cycle time
- Minimization of customer inquiries.
- Increase in accuracy and completeness of order data
- Improvement in the visibility of customer profiles, buying patterns, and promotional adoption



About the Client

The client is the world's leading provider of enterprise open source solutions, using a community-powered approach to deliver high-performing Linux, cloud, container, and Kubernetes technologies. Founded in 1993, Red Hat has its corporate headquarters in Raleigh, North Carolina, with other offices worldwide.



Solution Components

Conga CPQ, Conga CLM, Salesforce Sales Cloud, Oracle EBS, JIRA, Aha!

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