

Reducing Cycle Time By **75%** With Salesforce CPQ Implementation



THE CHALLENGE

The client is a globally renowned name in brain technology, focusing on accelerating humankind's adaptability, recovery, and learning capabilities. They needed a Salesforce CPQ solution that could resolve issues in their CRM that directly impacted their business plans.

- » The client prepared their quotes using Excel sheets for all their products and leveraged the software's flexibility to copy line items and add cell-level formulas. However, this practice was prone to errors and had a distinct lack of standardization.
- » Since they dealt with a complex product portfolio, it was difficult for the sales team to generate smart quotes for their customers. This meant that the sales team had to spend a lot of time generating quotes manually and could not spend more time selling the products.
- » They needed a customized CPQ process to transition the manual quoting process to a system-driven work order process using Salesforce CPQ.
- » Their existing process dealt with multiple sheets, and they needed a Salesforce CPQ solution that supported all the functionalities of Excel without the downside of errors.
- » It was challenging for the client to maintain different headers when creating a standardized Salesforce CPQ solution.

THE GROWTH NATIVES TEAM'S SOLUTION

The Growth Natives team worked closely with the client to analyze their use cases and business scenarios to cultivate the best solution for their brain technology business. Our team followed the Agile approach to design and development to create a customized solution for the client.

Our team delivered the desired solution with the following process:

- » Creating cart-level, price, and product rules for product bundles under CPQ product configuration.
- » Implementing a complex pricing setup for default prices, discount schedules, multiple currency setups, and regional pricing.
- » Streamlining the approvals set up to authenticate new user creation, standardize rules creation, establish an approval hierarchy and organize delegated approvals
- » Automatic document generation in different languages using existing templates, CPQ translations, and location-based conditional translation capabilities.
- » Generating renewals using intimation and other mapping rules.
- » Structuring an amendment set up with the option to cancel contracts.
- » Facilitating work order automation installation and activation of SQ license upon credential activation.
- » Granting permission sets to different users based on their position in the company's hierarchy and operational territories.

THE IMPACT

Growth Natives' Salesforce CPQ implementation helped the client improve their business tremendously and allowed them to increase their revenue manifolds with automated measures in place.

Our solution helped the client in the following ways:

75%

Reduction in cycle time with the automated cost planning process.

49%

Increase in proposal generation volume by eliminating manual data entry.


55%

Increase in compliance with easy template management.



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