



# Salesforce CPQ Implementation

Comprehensive CRM Solution Needed for Leading SaaS Company Continuing to Grow

With Salesforce Sales Cloud, Service Cloud and Community Cloud, as well as CPQ & Billing and Chatter, a leading SaaS company enhances their customer experience with a comprehensive CRM solution.

## Client Profile

Leading SaaS Company

## Business Challenge

Unlike a typical product company (software or other), the client has significant variation in the way they price. Because they frame their services – and pricing – based on individual customer needs, no two transactions are alike. This made the type of configuration needed on the back-end to tie sales and financials cohesively together through a CRM

remarkably complicated.

The lack of pricing standardization combined with the desire to use a new (and rare) software, CPQ, made it challenging to identify the right solution and resources with experience to execute on the implementation.

## Project Overview

LABUR identified credible project resources from near and far – New Jersey, to Chicago, to Seattle, Washington – with the right experience to execute on the business requirements.

Requirements included:

- Migrating all existing tools to

CPQ as the centralized record for financials and sales

- Configuring and validating pricing so that it is adaptable
- Simplifying, streamlining and enhancing the customer experience throughout the purchasing lifecycle

## Delivered Results

LABUR provided strategic advisory services – and staffed much of the project team, including Techno Functional Business Analysts, Solutions Architects and a Project Manager – to successfully execute the CRM implementation.

- Salesforce Sales Cloud, Service Cloud, Community Cloud and Salesforce Chatter were implemented to connect, expedite, automate and improve the quality of the lead-nurture process.
- Salesforce CPQ (Steelbrick) was implemented, and delivery included highly-customizable templates, validation testing and prompts to successfully guide

customers throughout the buy journey – including flagging products that should not be bought together.

- The client now has a fully integrated quoting and ordering process with a 360-degree view of its customers, including which products they're using, payment terms and processes, quotes in progress, suggestions for other products, and account and conversation history.

