

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 OBJECTIVE

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.

CASE STUDY

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.

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