

PE-BACKED SERVICES COMPANY · 9,000 ACTIVE CONTRACTS

Quote-to-cash rebuilt on Salesforce, Conga and Oracle

5 → 18

pricing segments, across about 50,000 zip codes

36

fields mapped to Oracle billing, no new fields downstream

1,500

opportunities migrated; 98 sellers trained at Release 1

THE PROBLEM

What the sales team sold did not always match what the contract said or what billing charged. Opportunity data, pricing, contract terms and invoices lived in separate systems, and the record drifted at each handoff. Clients felt the mismatch within weeks of service start.

WHAT WE DID

We defined the target design across four layers: the sales workflow, pricing and approvals, contracts, and the billing integration. The client's internal team and its development partner built the system; we reviewed and approved each design before build. Market rates, cost assumptions and margin thresholds are held as settings, not code, so the business can change them without a release. Approvals route through a gross margin matrix, so routine deals can be approved automatically as confidence in the rules grows. We designed and built the Conga templates; the client's legal team owns the legal language. Every major design choice is recorded with its reasons and the options considered. When estimation sized Release 2 at 4,200 hours, we recommended moving the launch five weeks rather than cutting testing.

RESULTS

- 1 Release 1, the opportunity workflow, went live in April 2026 with no design-level findings in user testing. About 1,500 opportunities migrated and 98 sellers trained.
- 2 Release 2, covering pricing, approvals, contracts and billing, went live in September 2026.
- 3 Pricing moved from 5 market segments to 18, across about 50,000 zip codes.
- 4 The billing integration maps 36 fields onto the existing Oracle setup and adds no new fields downstream.
- 5 26 architecture decision records by week 8, covering pricing data model, approval hierarchy, quote workflow and catalog model.

CLIENT

PE-backed services company with a national footprint and about 9,000 active contracts

OUR ROLE

Lead solution architect for the program; hands-on build of the Conga contract templates

SYSTEMS

Salesforce Sales Cloud, custom Lightning Web Components, Conga CLM, Oracle billing

TIMELINE

March 2026 to present; engagement extended twice

Pricing and approval rules held as configuration, so the business changes them without a release.