Case Study

jade GLOBAL

Sales Cloud® Optimization Empowers Adaptive Insights to Reach Record High Revenue and Improve Efficiencies in the Lead-to-Cash Process

Products & Services

- Salesforce CPQ
- Salesforce Partner Communities
- AppExchange® and Top of the Funnel
- Advanced Approvals

Client - Adaptive Insights, Inc.

Industry - Technology

About the Client

Adaptive Insights, Inc., formerly Adaptive Planning, Inc., is a Software as a Service company that provides cloud-based software solutions. The company operates Adaptive Insights Business Planning platform, which helps enterprises model their businesses, monitor and analyze financial and sales performance and manage productivity. Adaptive Insights is headquartered in Palo Alto, California and was founded in 2003.

Business Requirements

- Comprehensive top of the funnel orchestration and sales process reengineering
- Optimize Sales Cloud®
- Migrate quote templates from existing tools to CPQ and assure regional compliance and sales operations best practices
- Partner with sales leadership to drive agile lifecycle velocity, including workshops, sprints, technical design, build, test, deploy and stabilize
- Align products and selling methods with CPQ solutions
- Eliminate booking errors through adaptable configuration of validation and pricing rules
- Perform enhancements to refine SDR, AM and sales operations experience with guided flow
- Enable core CPQ functions on mobile platforms
- Reformulate internal sales user experience for opportunity-to-order flow based upon sales and legal handoff governance model, enabling circles of success across CPQ, CLM, eSignature, and secured document storage

Health Check and Project Scope

When an existing client referred Jade Global to Adaptive Insights, Adaptive Insights was looking to stabilize its CRM environment and find a partner of choice. Adaptive Insights was growing very quickly, had an evolving suite of products, and required to scale. There were significant data and orchestration challenges across the Top of the Funnel. Jade Global addressed system and technical discovery needs by performing a health check. Adaptive Insights was looking to stabilize, pivot into a scale model and optimize its Sales Cloud® implementation. Jade Global also participated to design a new experience for CPQ, CLM, eSignature, and document storage.

Adaptive Insights wanted to migrate its existing quote templates in CPQ to speed-up the booking process and deliver accurate and compliant quotes world-wide. The solution will fully align with Adaptive Insight's operation guidelines and have mobile compatibility.

wanted to migrate all of its quote templates from existing tools to Salesforce CPQ. They wanted the new solution to be mobile compatible and have an experience that aligned with company brand guidelines.

Addressing Errors in the Quote and Lead Conversion Process

One of the biggest challenges for Adaptive Insights was that their existing Salesforce system failed to resolve inaccuracies in the quote process. The company was experiencing errors in its Salesforce system during activation of orders. There were issues in the lead conversion process and proper product mapping/grouping was not in place. Workarounds had been put in place to compensate for these errors, however they led to further problems. For example, partners were creating contacts using lead registration forms, leaving confidential sales data accessible to all partners. Overall, business processes were not aligned with Adaptive Insights' IT solution.

Business Challenges

- Out-of-the-box (OOTB) functionalities did not meet certain business requirements
- Not able to perform exhaustive testing as quickly as items were being developed
- Low fidelity in quote formatting
- Products being quoted and presented in suboptimal or incorrect combinations
- Long list of products without any groupings and significant training needs to impart tribal knowledge experience
- Sales approvals were handled in a variety of online and offline methods; lack of mobile capabilities for ease and velocity of approvals
- Technical and process debt of the instance, due to moving fast through several growth milestones. Instance health required attention.
- Business process innovations and the CRM solution were not always in alignment
- Lead-to-quote conversion process was cumbersome, Quote-to-Cash process was not effective
- Loose sharing models across sales and data; too much sales data exposed to partners
- Duplicate leads and contacts created, no feature for finding matching leads/contacts
- No way for multiple signing of documents

Customizing CPQ to Solve Key Business Challenges

Jade Global began resolving key business challenges by completing a health check and fixing code-related errors. The development team completed the CPQ implementation and refactored Top of the Funnel activities for effective lead management. Jade's technical experts prioritized Salesforce declarative platform capabilities to fit Adaptive Insights' requirements. All data entry errors were researched, which helped the sales and marketing teams conduct workshops to define and illustrate a granular business and system process flow, creating trust in the information and more importantly the sales acquisition process. Modern security and sharing settings were demonstrated and reviewed to discover the best model for Adaptive Insights' teams. Sales leadership wanted to enable and prioritize the most actionable information for each audience within Adaptive Insights. Proper validations and end-to-end approval process were set, tested and revised. The development team customized quote and lead registration pages using Salesforce Lightning. This helped Adaptive Insights avoid complexity and utilize technical resources for the highest business impact.

During the final phases of the project, Jade Global trained users at Adaptive Insights for quick and efficient adoption and monitored as partners registered opportunities in a more consistent manner, resulting in greater shared channel business success. Understanding insights, trends and consistent data allowed teams to pinpoint opportunities and close more opportunities.

More Closed Deals at Faster Rates

After Jade successfully stabilized the Salesforce® system, Adaptive Insights users reported more than 15% improvements in efficiencies and record revenue and sales. Adaptive Insights sales organization achieved certainty, velocity and a true system of engagement. Employees saved about 6 hours out of every 40-hour work week from reducing the time spent researching quotes. The extra time allowed employees to focus more on customer service and engagement. The Adaptive Insights sales team reported more flexibility to offer product discounts and a variety of product combinations to meet customer needs.

CPQ streamlined the entire buying journey with a guided flow, which translated into more deals closed at faster rates. CPQ has helped to establish Adaptive Insights as a thought leader and trusted advisor in the field of information technology.

The Solution

- Stabilized and enhanced end-to-end CPQ implementation
- Optimized existing automation and helped create trust around lead enablement data
- Revamped the Salesforce Security and Sharing Model for Adaptive Insights current scale
- Introduced Salesforce Lightning components where appropriate
- Revised quote templates and other designs with a larger group of stakeholders
- Established prompts to guide the user to review products before continuing with product selection
- Established and automated the entire channel leads funnel
- Established Validations to prevent users from selecting products that shouldn't be selected together
- Enabled approvals with mobile capabilities

The Benefits

- Improved efficiency of Quote-to-Cash process by more than 15%
- Improved user experience and flow
- Streamlined guided flow for processing deals accurately and quickly which led to reduced time to close deals
- Enhanced tracking of lead channel for sales representatives and partners
- Enhanced accountability for leads and contacts with single source of truth for all information
- Controlled security and sharing model to retain the privacy of sales data
- Multiple approvers can sign opportunity-related documents
- Easier access with mobile compatibility

About Jade Global

Jade Global provides enterprise business application implementations, integrations, software product engineering, Cloud services, technology advisory, testing, and managed services. We are headquartered in San Jose, California with U.S offices in Philadelphia, Boston, Los Angeles, San Diego and Atlanta. Jade Global is an Oracle Platinum Cloud Select partner, Salesforce Silver Partner, ServiceNow Silver partner and Microsoft Gold partner. We have additional strategic partnerships with Zuora, Dell Boomi, NetSuite, and Tableau. Jade is a member of the Oracle Cloud Excellence Implementor (CEI) Program and has been recognized as one of the fastest-growing companies in North America by Inc. 5000.