



Maximizing Your Salesforce CPQ Investment

Leveraging The CPQ Vendor Ecosystem To Enhance Benefits And ROI

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Configure-Price-Quote (CPQ) tools are one of the hottest sectors of the customer relationship management software market, and for good reason: Whether B2B or B2C, today's customers expect a fast, streamlined purchase experience. Companies are working hard to digitally transform their organizations to meet these elevated expectations by adopting powerful tools like Salesforce's CPQ app.

Gartner forecasts that the CPQ market will grow at about 15% annually.

According to Gartner, the top three reasons customers purchase CPQ software are to produce quotes faster (73%), improve sales rep productivity (63%) and replace existing outdated systems/processes (58%). And after deploying CPQ, companies say their biggest business benefits are improved order accuracy, faster creation of quotes and improved pricing accuracy.

The right CPQ solution goes a long way toward delivering those benefits, but it doesn't do so alone. CPQ buyers have important decisions to make about the add-ons, tools and service providers they choose to enhance their CPQ implementations. Strong integrations and a well-designed implementation plan help to:

- Maximize your CPQ investment to speed ROI;
- Streamline deployment and future modifications;
- Increase sales productivity and efficiency; and
- Deliver benefits faster.

Companies choose Salesforce CPQ to save time and make employees' work life easier by coordinating and streamlining customer-facing and administration processes. Selecting key Salesforce partners for functions including sales tax calculation, release management and implementation services can accelerate these benefits, helping to ensure not just a successful implementation but an efficient, scalable and sustainable one.

“Even tried-and-true sales technologies, such as configure-price-quote (CPQ) and sales force automation (SFA), still bring significant value to sales organizations despite their relative maturity.”

TOM KANESHIGE,
[FORRESTER](#), JANUARY 2019

MAXIMIZING CPQ INVESTMENT STRATEGY #1:

Automating Sales Tax Calculation

When buyers become accustomed to acquiring anything they need in just a few clicks, they bring those expectations to every transaction — from something as simple as today's lunch to the complex products they purchase in their jobs. It's essential that businesses provide a **fast, accurate quote every time**, no matter how many changes are made to the product configuration or other details along the way.

Calculating the right sales tax is essential to making sure the quote is accurate — and it's surprisingly difficult to do right without a well-designed tool. That's why **CPQ Investment Strategy #1 is to use a sales tax application**.

Consider the potential ramifications. Without an application such as Vertex, an account executive developing a quote in Salesforce would have to go into a separate sales tax calculator to get the right tax or VAT rate, then manually re-enter that data into the quote — and then repeat these processes if the customer changes the shipping destination, purchasing entity or other details. Manual data entry leads to:

- Higher costs
- Errors
- Delays
- Liability



A connector tool such as Vertex for Salesforce integrates tightly into the CPQ module, so users can access fast, accurate tax data every time. Here's how it works:

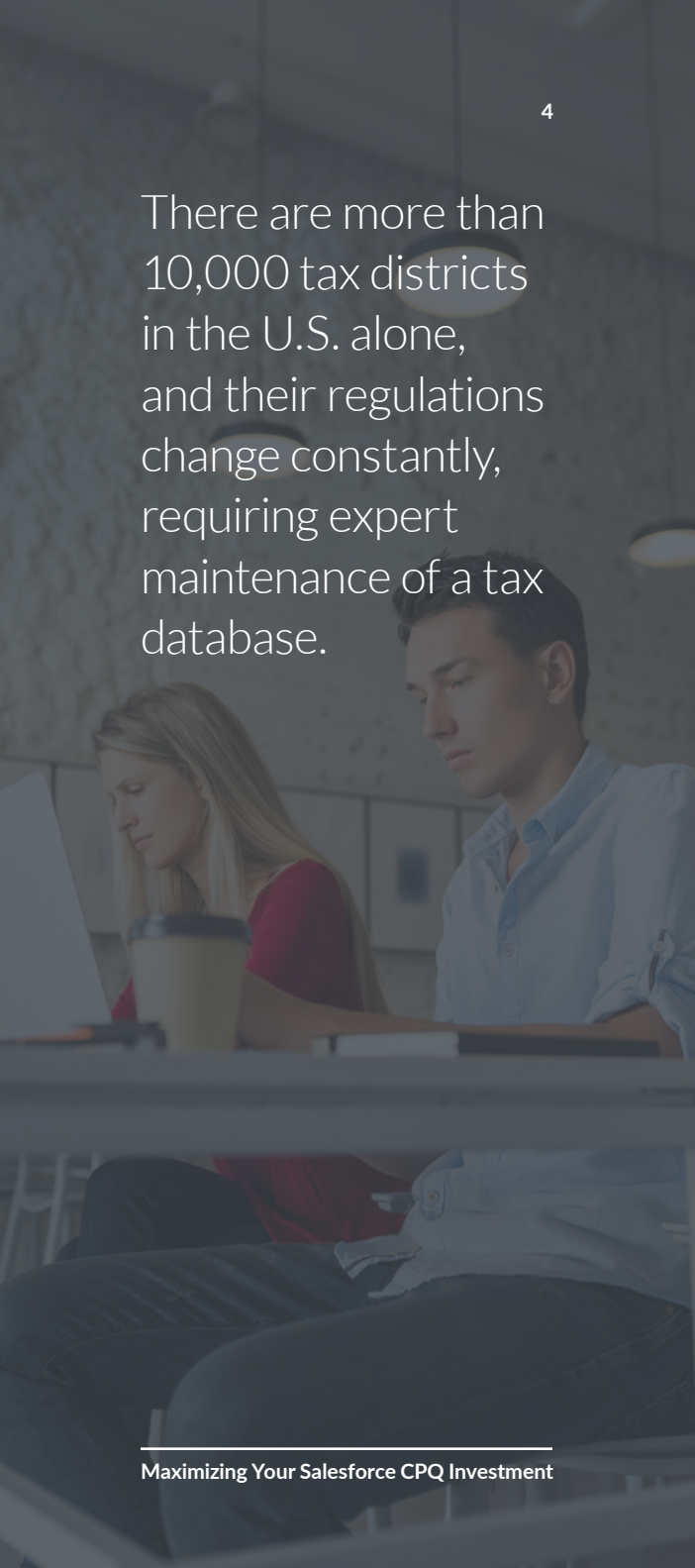
- Salesperson enters or modifies a customer's ship-to address in Salesforce and then creates a quote.
- The integrated Vertex connector sends a call to its address verification master tool partner to ensure that the address is properly formatted and verified.
- Vertex matches that verified address to the tax rules that apply to that specific product, material and tax jurisdiction.
- Vertex provides the correct tax or VAT back to Salesforce CPQ, so the quote is accurate.

All this happens within seconds, so the quote is always up to date with the latest, most accurate data, no matter how many times it's changed.

According to [Accenture Interactive](#), 83% of sales professionals are using some form of a CPQ system.

By integrating Vertex's CPQ module, part of The Vertex for Salesforce CRM Connector, in a Salesforce CPQ implementation, businesses enjoy benefits including:

- Reduced manual entry
- Higher accuracy levels
- More real-time reporting
- Increased productivity
- A faster order-to-pay cycle

A man and a woman are sitting at a desk in an office, working on laptops. The woman is on the left, wearing a red top, and the man is on the right, wearing a light blue shirt. They are both looking down at their screens. There is a coffee cup on the desk in front of the woman. The background is slightly blurred, showing office shelves and lights.

There are more than 10,000 tax districts in the U.S. alone, and their regulations change constantly, requiring expert maintenance of a tax database.

MAXIMIZING CPQ INVESTMENT STRATEGY #2:

Leverage Admin Tools To Simplify Deployment And Maintenance

In addition to the powerful benefits Salesforce CPQ delivers to users, many companies choose it because it's easier and relatively inexpensive to adopt and manage. Salesforce CPQ is a "low-code" application, but that doesn't mean companies should abandon the agile development process of moving changes across separate Salesforce orgs for development, testing, training and release. On the contrary, since the revenue of the entire company is running through CPQ, **good change management and governance are vital** to ensure:

- Uninterrupted CPQ access for users creating, approving and sending quotes;
- Quotes are accurate with up-to-date pricing, bundles and discounts;
- Issues are caught before they're introduced to production; and
- Changes are tracked and admins can roll back to previous versions of CPQ if needed.

Salesforce change sets were not designed to move the data in low-code apps, so it can take dozens of hours to deploy CPQ changes across Salesforce orgs, leaving little time for QA and testing. An incorrectly configured CPQ causes users to lose trust in the system, negatively impacting productivity and adoption. For these reasons, best practices suggest using third-party tools and expertise to ensure faster, smoother deployments and easier maintenance moving forward.



CPQ Investment Strategy #2 is to make use of a **Salesforce Application Operations suite**, such as Prodlly AppOps, to build, test and deploy Salesforce CPQ – and then later to manage ongoing improvements to CPQ. AppOps automates data deployments, version control, regression testing and other CPQ configuration tasks that would otherwise be painful, tedious and error-prone. This is essential for migrating large volumes of data without errors, avoiding bottlenecks in the development process and saving hours of manual work.

INDUSTRY AVERAGE CPQ IMPLEMENTATION TIMES (GARTNER)



Successful adoption and rapid ROI from a Salesforce CPQ implementation depend on a **well-crafted deployment and maintenance plan**. By leveraging tools such as Prodlly AppOps, CPQ admins can be more productive, remove the risk of interruption to day-to-day operations and deliver more frequent improvements to CPQ and the business.



MAXIMIZING CPQ INVESTMENT STRATEGY #3:

Choosing The Right Implementation Partner

Salesforce CPQ is not something you install once and move on: As a business' prices, products and policies evolve, its CPQ software must evolve, too. Many companies re-implement their CPQ several times.

That's why **how you install a CPQ is just as important as which app you choose**. A well-run implementation is thoroughly planned, simultaneously rolled out and tested, and automated wherever possible, to ensure a smooth implementation as well as easy maintenance and re-deployment over time.

CPQ Investment Strategy #3 is to leverage a third-party expert with a time-tested methodology to drive a smooth, successful deployment. Hallmarks of a solid Salesforce CPQ deployment methodology include:

- Applies the concepts, strategies and rigor used in DevOps projects;
- Employs good governance, documentation and audit practices;
- Leverages automation tools such as Prodlly AppOps;
- Includes a solid, step-by-step migration plan based on proven best practices;
- Applies rigorous testing throughout implementation and post-migration; and
- Takes advantage of Salesforce Success Programs to ensure predictability and repeatability.

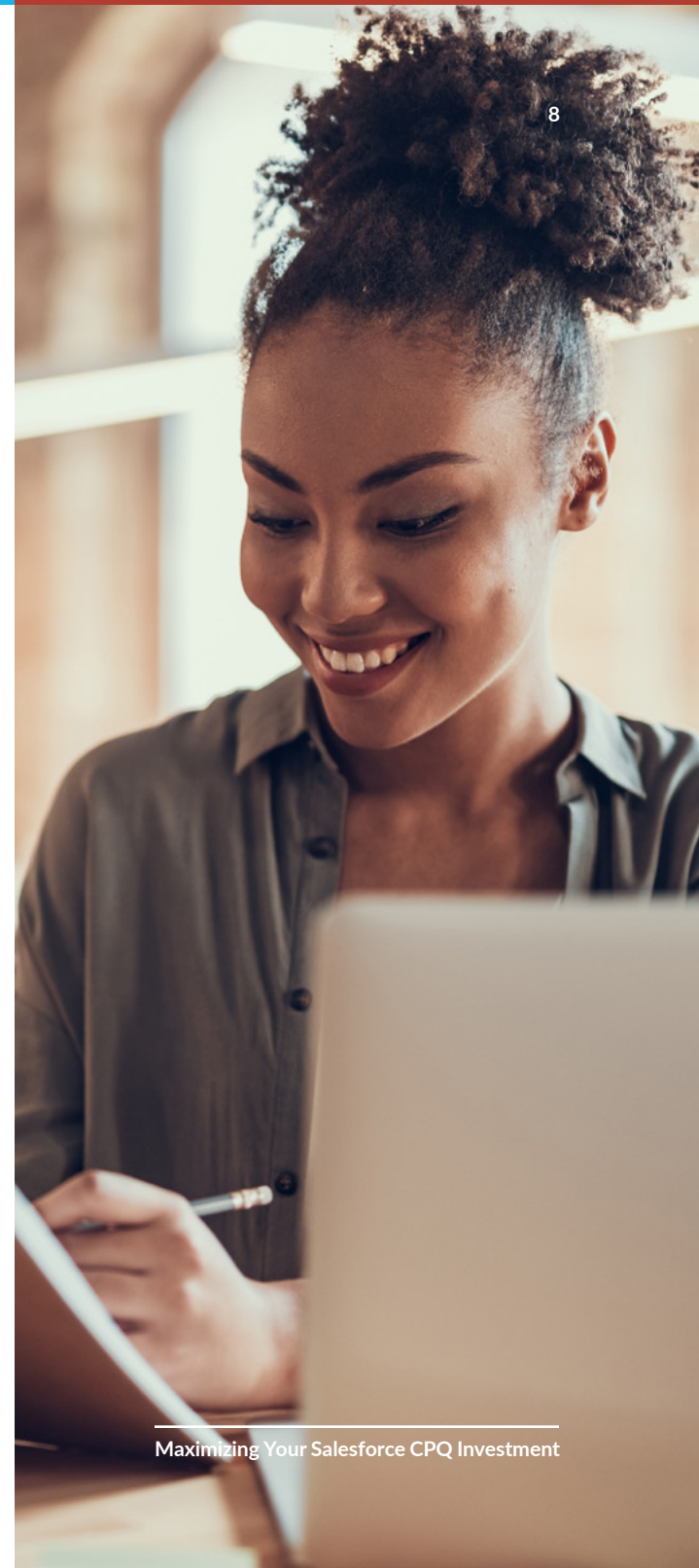


Choosing an experienced integration partner like Simplus is an optimal way to ensure best practices are applied throughout your Salesforce CPQ implementation — and the re-implementations that follow. Steps to ensure your chosen partner is highly qualified include:

- Applies the concepts, strategies and rigor used in DevOps projects;
- Employs good governance, documentation and audit practices; and
- Leverages automation tools such as Prodlly AppOps;

Nearly 40% of companies surveyed by [Gartner](#) have used a third-party integrator for CPQ implementation, exclusively or alongside consultants from the CPQ vendor.

CPQ projects are long-term investments. Every company evolves over time to support its growth strategy, and these ever-changing policies must be built into the CPQ application. Finding a seasoned, highly rated, long-term partner such as Simplus is key.



Achieving A Better, Faster Salesforce CPQ Implementation

CPQ applications are mission critical for ensuring successful customer relationships and rapid quote-to-cash cycles, and they are widely used across an organization. That's why it's essential to get the implementation right. Choosing best-in-class Salesforce partners for functions including sales tax calculation, implementation services and reference data management helps ensure the CPQ tool is implemented on time and within budget, delivers a better ROI and ensures a richer end-user experience. This results in better adoption and long-term benefits for users and customers alike.

“Businesses need to support multiple sales channels and shorten overall sales cycles to remain competitive as companies win deals by providing quotes and offers faster than their opponents.”

NUCLEUS RESEARCH,
FEBRUARY 2020





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Prodly helps companies build and continuously improve business applications faster, more reliably and more frequently. Prodly's AppOps platform automates the full lifecycle of low-code development, empowers more non-developers to configure applications, removes bottlenecks in the development process and provides IT governance to mitigate risk of agile development. Customers use Prodly AppOps to update mission critical applications such as Salesforce CPQ, Salesforce Billing, Field Service Lightning and Salesforce B2B Commerce at the speed of business.

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Simplus is a Certified Platinum Salesforce Partner. We are Salesforce experts, specifically focusing on CPQ, Billing, Sales Cloud, Service Cloud and Pardot. Because of its commitment to simplifying the Salesforce implementation journey for customers, Simplus is the only designated Salesforce consulting "leader" on G2Crowd. Simplus has completed more than 2,000 successful projects and is in the top 1% of all implementation partners by customer service rating.

[1.833.SIM.PLUS](tel:1.833.SIM.PLUS)



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