Customer Success

aMind Implements Salesforce CPQ at Remind

Replaces Zuora Quotes with fully-automated website-lead-to-quote within Salesforce CPQ. Eliminates sales quoting inefficiencies, shortens time to close, and boosts management reports and customer satisfaction.

Background

Industry: Education Technology
Headquarters: San Francisco, California
Founded: 2011 – 20 million monthly users. Used by 50% of U.S. public schools.
Salesforce CPQ

Business Challenges

- Rapidly growing startup outgrows Zuora Quotes. Requires a quoting solution that scales with the business and supports paid features, such as subscriptions.
- Management lacked visibility to KPI's needed for optimal decision making.
- Integrate with website to support self-serve as well as the sales-driven process.

- Time-consuming and error-prone manual sales process and workarounds extended the time to develop quotes, and led to errors.
- Requires a single source of revenue recognition data for Finance billing and reporting.
- Support integration to Docusign, Marketo, Outreach.

Technical Challenges

- Two separate systematic Sales flows that resulted in the creation of different quote object records, which did not provide for a streamlined way to track Quotes or report on metrics such as total Closed/Won Opportunities, Account Churn, ARR etc.
- Existing Zuora Quotes system did not prorate pricing, requiring sales to manually calculate prices.

- Every Remind subscription product required its own individual SKU in the product catalog.
- Support integration to Docusign, Marketo, Outreach.
- Used static text fields that had to be checked, easy to miss.

Results

Reduced Inefficiencies and Manual Workarounds

✓ Sales teams sell more efficiently to customers.
✓ Reduced the time to close opportunities.
✓ New customers are on-boarded more efficiently.
✓ Improved SKU management.
✓ Supports more non-standard contract terms to suit customer needs.
✓ Provides more robust reporting and analytics capabilities to track revenue and other key management metrics.

Enhanced Employee Efficiency

Improved Management
- Streamlined sales process by replacing Zuroa Quotes and SaaS Optics, with Salesforce CPQ. Fewer systems to oversee, train, reconcile and support.

Seamless Sales Process
- A lot of processes that were followed involved manual intervention. That has been almost totally eliminated, with the exception of certain types of website self-service quotes.

Reduced SKU Proliferation
- aMind cleaned up and simplified Remind's product catalog. Originally every combination (30+) of Remind subscription products required its own individual SKU in the Product Catalog. By leveraging a Bundle Product with Product Options, aMind reduced subscription products to 5 SKUs in the Product Catalog.

Reduced Time to Quote
- The right products, pricing, controls for discounting and generation of forms are all streamlined in Salesforce CPQ.

Enhanced Reporting
- Streamlined reporting in Salesforce for ARR, churn, forecasting, etc.

Standardized Pricing and Discounting

Increased Profitability

Improved Sales
- Increased sales productivity, quality, throughput of sales outputs and reduced manual processes. Remind is now able to serve more customers with a better buying and renewal process.

Reduced Time to Quote
- The right products, pricing, controls for discounting and generation of forms are all streamlined in Salesforce CPQ. This leads to shorter sales cycles and faster revenue recognition.

Slashed Quote Preparation Time
- By moving quoting to Salesforce, Remind eliminated the time it takes for sales to manually input Opportunities and Quotes, and reduced errors.

Improved Quote Accuracy
- Reduced discounting and approval errors, previously managed through email.

Accurate and Timely Product Discounting
- The ability to discount and price is significantly improved. CPQ processes now drive discounts, instead of manual calculations to an eighth decimal place.

Automated Product Renewals
- Each renewable product is on the subscription, as opposed to a variation of each SKU for all product combinations.

Increased Customer Satisfaction
- Improvements in productivity allow Remind to serve more customers while increasing retention.

![aMind — ELEVATE YOUR BUSINESS]

Salesforce CPQ
Modules and Features

Salesforce CPQ
Quotes
Product Bundles
Contracts & Subscriptions
Quote Templates
DocuSign for Quotes
Salesforce (Standard) Approvals (not CPQ+/
CPQ Advanced Approvals)

Extensions
Parent/Child Accounts for school districts and schools, extended with student information that drives pricing.

"Multi-Location CPQ" extensions so they sell 1+ bundles of services to the school district, but track which schools get which bundle and price the bundle based on total students in those schools.

Automated migration of active customer subscriptions into Salesforce.

Fully-automated website-lead-to-quote.

Fully-automated subscription renewals process.

Countries
North America

Channels
Internal Sales
Sales Agents

Integration
DocuSign Managed Package
Customer Self-service
from Public Website