

# **aMind transforms Gordian's Quote-to-Cash processes leveraging Salesforce CPQ & Billing**

Replaces Zuora Quotes and Billing with SF CPQ & Billing for multi-channel enablement across Sales & Customer e-commerce.



## **Background**

Industry: Technology – construction/facilities management

Headquarters: Greenville, SC.

Founded: 1990

Ownership: Public (a Fortive Company), NYSE: FTV

Salesforce CPQ and Salesforce Billing

## **Business Challenges**

- Growth through acquisitions resulted in multiple software systems serving clients across channels. This increased maintenance costs, impeded business processes, no 360-degree view of customer, and caused business inflexibility.
- Inflexible legacy back office tools created friction in ordering processes, hampering growth and customer satisfaction.
- Requires a complete IT transformation. Lack platform and strategy.
- Unable to provide customers with self-service/poor online storefront experience increased cost of sales.
- Quote and configuration errors don't surface until provisioning.



## Project

aMind put in place an IT transformation strategy to upgrade Gordian's quote-to-cash technology stack to support the customer storefront and inside sales channels for Gordian's estimating business. The project will roll out in phases. Phase 1 includes:

- Replace Zuora Quotes & Zuora Billing with Salesforce CPQ & Billing
- Rollout a new eCommerce tool for self-service ordering (Magento)
- Deliver a solution for Customer Master Data Management (Boomi)

### **Upgrade Quote-to-cash Technology Stack**

- By moving quoting to Salesforce, Remind eliminated the time it takes for sales to manually input Opportunities and Quotes, and reduced errors.
- Retired legacy systems Zuora and decommissioned legacy order management system.

### **Optimize the Customer Experience for Self-service Ordering**

- Delivered a revamped online storefront experience to customers in advance of Gordian's "busy season" for the ordering of estimating products.
- Drive a larger percentage of orders through the online storefront vs. inside sales.

### **Reduced Friction in the Customer's Quote/Order/Purchase Process**

- Establish an accurate customer view in the Salesforce front office to drive the right inside sales activities.
- Put amendments and renewals in the hands of sales reps working in Salesforce, vs. having to route those processes through a separate billing cloud.
- Adopted flexible patterns for product bundling, pricing and usage-based models.
- Eliminated quoting and configuration errors that didn't surface until provisioning.

## Salesforce CPQ & Salesforce Billing

### Modules and Features



#### **Salesforce CPQ**

Quotes & Orders  
Contracts & Subscriptions  
Advanced Approvals – Quotes  
Quote Templates



#### **Salesforce Extensions**

Automated / "touchless" subscription renewals.

Framework for Salesforce integration  
best practices using declarative "notify and  
callback" pattern without code.

Heavy use and leverage of Dell Boomi AtomSphere.



#### **Salesforce Billing**

Invoices & Credit Notes  
Electronic Payments & Refunds

Framework for marketing-controlled  
effectivity for sales promotions.

Framework for customer-facing and internal  
notifications based on billing-related events.

Automated conversion and migration of historical  
Zuora subscription data into CPQ/Billing.



#### **Countries**

North America



#### **Channels**

Inside sales representatives  
Customer self-service



#### **Integration**

Magento  
Boomi  
NetSuite