CHALLENGE

Community Brands wanted a streamlined, end-to-end service and sales solution to automate processes and increase efficiency.

- Community Brands growth model is one of Growth through Acquisition

- Community Brands is composed of several entities. Consequently there was a lack of standardization across quoting outputs and back-end integrations

- This resulted in differing operating strategies, misaligned business practices and decentralized management

SOLUTION

Community Brands was challenged with managing their existing Salesforce strategy to support their growth and scale.

- Successfully merged 7 independent orgs into one consolidated org with aligned business practices

- Uptima assisted in designing and delivering a successful go-forward M&A Salesforce Strategy creating an ease of onboarding of acquisitions

- Ability for legal to manage all contract requests from a single location with full visibility into contract statuses

- Integration of DocuSign with Salesforce to allow for a seamless process

RESULTS

- Community Brands merged two business units from two SFDC orgs into one

- Multiple sales processes were streamlined into one, so sales teams could co-sell the different brands seamlessly and effectively

- Automated agreement generation and signing

- Centralized agreement repository

"I have had the pleasure of working with Uptima on several CPQ and CLM implementations in my roles with two separate companies. I am continually impressed with their deep domain experience and thought leadership in the Salesforce revenue management space. It is easy to work with Uptima because of their frank and practical nature combined with a customer and best practice centric approach."

BLAKE EACHES
Senior Director, Business Systems Operations

communitybrands

CLIENT

Community Brands is the leading provider of cloud-based software to associations, nonprofits, faith-based groups, and K-12 schools. With 2,000 employees serving over 100,000 clients in 30 countries, they help organizations grow stronger and achieve their missions.

INDUSTRY

Financial Service Cloud Software

CLOUDS

Salesforce CPQ
Salesforce Billing
DocuSign CLM
DocuSign eSignature
MuleSoft

PROJECT METRICS

Number of users enabled: 200
Project length to Go-Live: 7 months

SERVICES

Transformation & Implementation Services

salesforce PARTNER   **uptima.**