

CHALLENGE

- Wolters Kluwer CT Corporation wanted to optimize and modernize their selling and billing processes to empower users on a single platform in a self service model at the enterprise level.
- The goals of the program are to reduce TCO across the CRM tech stack and ongoing maintenance, improve UX, lessen architecture complexities, sell and collect cash faster while improving data integrity and quality.

RESULTS

Uptima gained customer's trust as an expert advisor and helped implement one of the largest transformation initiatives that truly pushes the limits of both Sales, Service Cloud and Revenue Cloud.

- Estimated CSAT & revenue increase with ease of automatic billing
- Estimated decrease in DSO & outstanding AR balances
- Reduced chance of billing error significantly
- Eliminated revenue leakage
- \$1 billion annually will run through Salesforce Billing

SOLUTION

Uptima is implementing Salesforce Sales, Service and Revenue Clouds to meet Wolters Kluwers transformation goals:

- Simplifying and automating CPQ and Billing processes for 2 primary channels: inside sales and customer self service on one platform: Salesforce.
- Focusing on transforming the revenue lifecycle - taking the opportunity to change by prescribing to industry best practices and utilizing robust OCM.
- Eliminating heavy tech debt which is overly complicated and expensive to maintain and manage and exposing meaningful layouts and data to meet persona needs.

"Uptima resources are highly engaged, knowledgeable, and organized. The combination of these attributes led to a very successful project outcome. In addition, their relationship with Salesforce helped enormously when encountered some of the more complex use cases."

DAVID KEDEM
Director, Business Transformation



CLIENT

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