



Customer Success Story

ZUCITECH SOFTWARE SOLUTIONS PVT. LTD.





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Comprehensive Salesforce CPQ Implementation and Quote to Cash Process Automation

Client Context

Unlike a typical product company (software or other), the client had significant variation in the way they price. Because they bill their services and pricing based on individual customer needs which meant that their contracts were always subject to change. This made the type of configuration needed on the back-end to tie sales and financials cohesively together through Salesforce & Accounting remarkably complicated. The lack of pricing standardization combined with the desire to use a new (and rare) software, CPQ, made it challenging to identify the right solution and resources with experience to execute on the implementation.

How We Did It...

CONNECTED PLANNING AND DATA QUALITY

across the organization to deliver accelerated planning cycles, scenario analysis, and consistent reporting

INCREASED USER-ADOPTION

We used AI driven System overlays on Salesforce for guiding internal Sales Ops and Service Teams to get trained on Salesforce CPQ without having to go through classroom trainings.

DEFINED MASTER DATA AND REPORTING STRATEGY

to be used across the organization and enhance MDM, governance, and cleanup

STANDARDIZED PROCESSES

across Sales & Accounting, to streamline drivers, inputs, and allocation methodology across the organization

What We Did...

Understanding Client SAAS Metrics:

ACV / ARR: Annual Contract Value (ACV) and Annual Recurring Revenue (ARR) are often used interchangeably. We understood how this was being done and a big portion of this was dependent on how they were calculating Monthly Recurring Revenue.

MCV & TCV:

Monthly and Total Contract Value (MCV and TCV) includes subscription revenue and any one-time charges, such as professional services or setup and installation fees. Client wanted this for predicting cash flow and renewal revenue, since one-time charges are not carried forward upon subscription renewal

CPQ Implementation: Salesforce CPQ was implemented and delivery included highly-customizable templates, validation testing and prompts to successfully guide customers throughout the buy journey – including flagging products that should not be bought together.

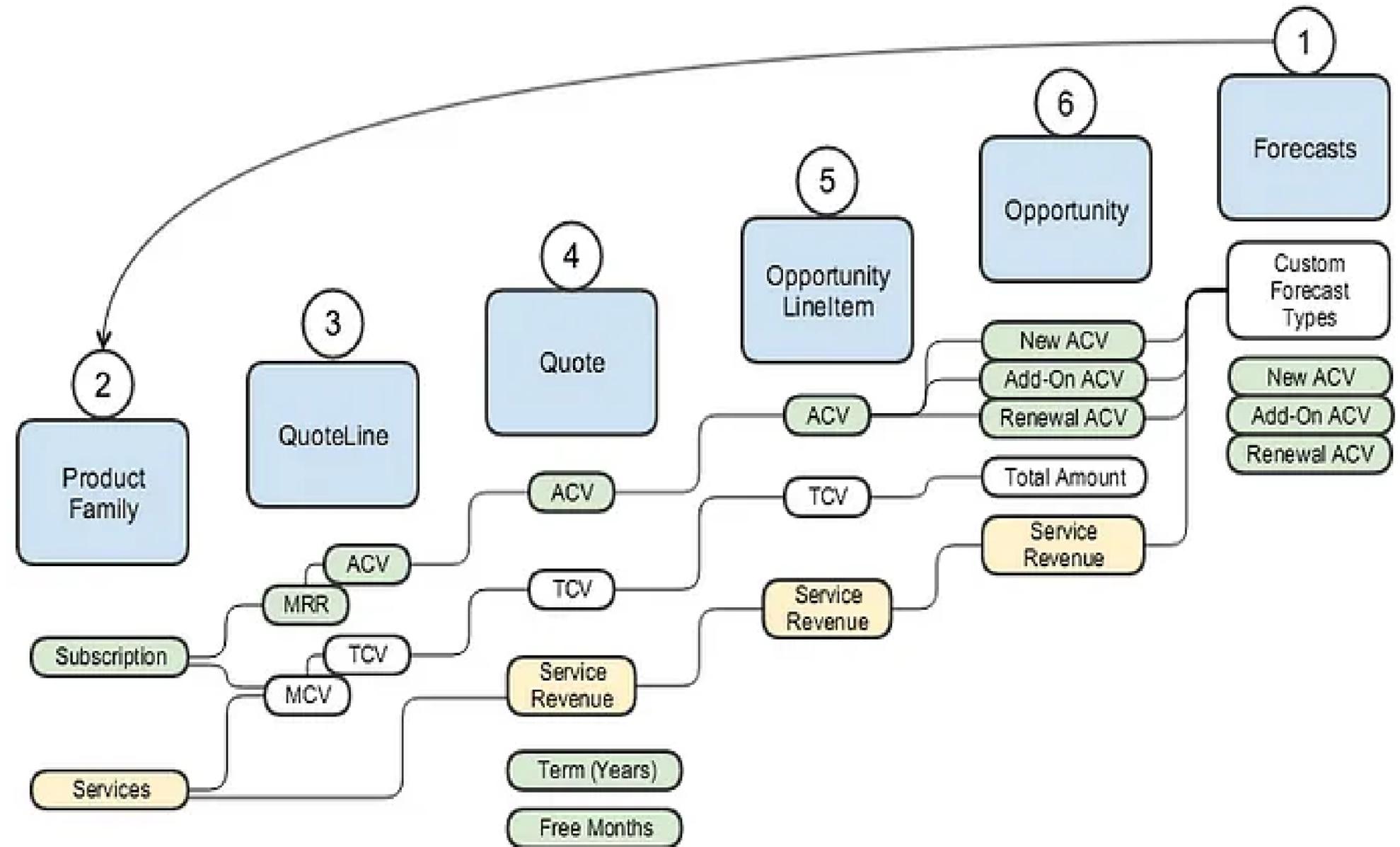
ERP Integration: Salesforce Opportunity to Invoice automation was developed with selective accounting data like A/R, Ledger Balance etc were integrated back to Salesforce for forecasting and predicting Sales and Renewals

CPQ Implementation & Configuration

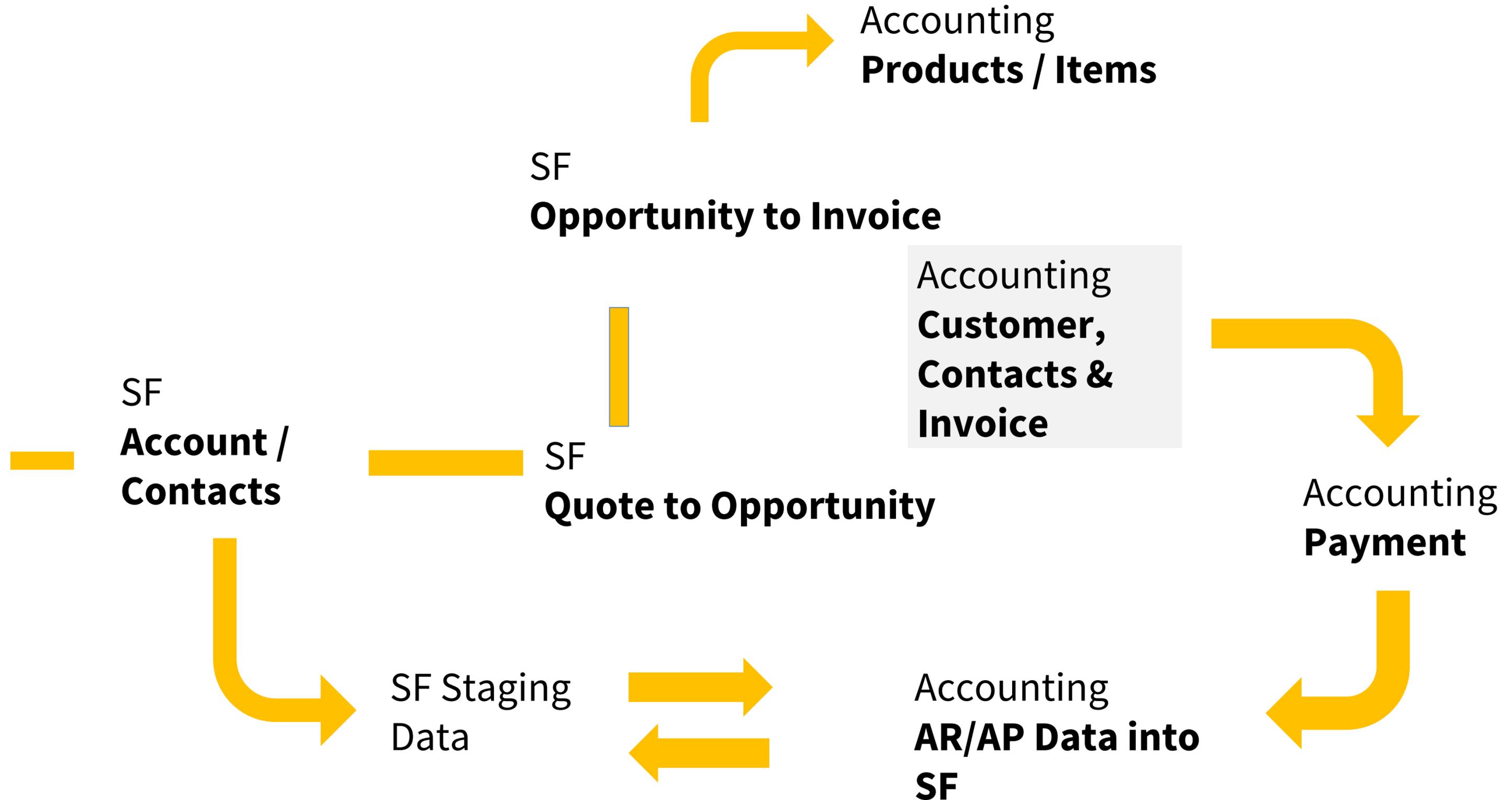
CPQ Customizations Delivered

- Custom Quote Templates across different Connector Licenses
- Quote Line Editor with Custom Scripts (Java scripts)
- Allows configuration of complex combinations of products in a single basket
- Developed highly configurable basket
- Custom UI for capturing product details during sales process
- Opportunity Configuration for Product Sales vs Service Sales.
- Contract Generation using DocuSign & other document composers
- Custom Currency Fields for tracking ACV and Renewal ACV Metrics
- Product Bundle, Nested Bundle & Discounting
- Free Months & Multi-Year Subscriptions for Enterprise Deals
- Allowing Segmented Pricing.
- Automated Amendments, Renewals & Alerts

CPQ Process At a Glance

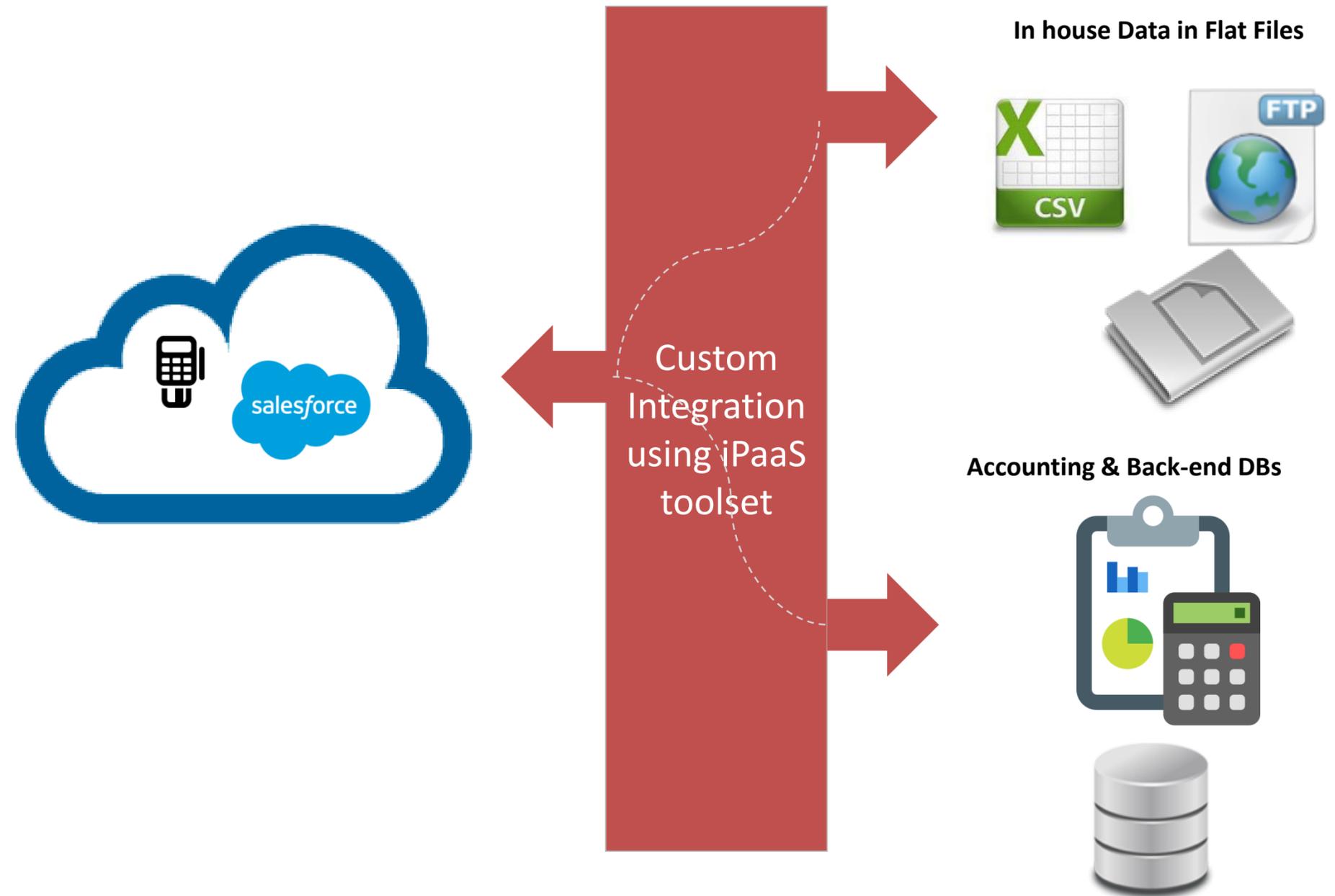


SF Quote to Cash Integration Solution At A Glance



Data Orchestration between Salesforce & External Systems

- ❑ Data spread across multiple data-sources and systems, both on-prem and cloud.
- ❑ Multiple Data Sources ensured that we define Master data and enforce MDM Methodologies
- ❑ A well defined staging environment ensured us to maintain data-quality & data governance.
- ❑ A well connected / integrated system enabled us to streamline processes like Quote to Cash (Receivable Automation) with accounting
- ❑ Salesforce was used as a system of truth with all data flowing into Salesforce.
- ❑ All data in Salesforce, enabled us to design reliable reports and data analytics of key business metrics.



Challenges & Outcomes

SITUATION

- ❑ Sales Cloud Implementation was falling Short of expectations.
- ❑ CPQ was not there and Client was using Standard Quotes, Pricebook and Products.
- ❑ Disconnected Process and systems across the board.
- ❑ Products or Connector licensing across wide spectrum – (SMB to Enterprise)
- ❑ Over 80% of time spent in correcting errors in Pre-Sales and Invoicing.
- ❑ Very minimum automation during post-sales process.

SOLUTION

- ❑ Migrated from Standard Quotes to CPQ
- ❑ CPQ Customizations for Products kits / bundles and enable Sales to offer discounted pricing with approvals
- ❑ Automated Invoicing within Salesforce after a Sale
- ❑ Designed system over-lays with other partner ISVs to train new users in Sales-Ops teams
- ❑ Near Real time integration with Accounting
- ❑ MDM implementation using Salesforce

OUTCOME

- ❑ Reduced Sales Cycle for business
- ❑ Over 80% operational efficiency in Sales Ops teams
- ❑ Multiple Pricing Models across different channels & different currencies.
- ❑ 100% Automation of Amendments & Renewals.
- ❑ Well Connected systems ensured reduced manual data entry
- ❑ Increased User-Adoption across Sales and Service teams
- ❑ Improved customer service ensured reduced customer churn



THANK YOU!

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