



CPQ JUMPSTART

a Turnberry Salesforce solution

salesforce

TIME FRAME: 12 weeks

RESOURCES: Experienced Salesforce CPQ Team

designed to deliver the jumpstart **YOUR SALES TEAM NEEDS**

Everything you need to stand up CPQ in your Salesforce instance in 12 weeks

- Decrease selling time by improving approval process
- Dramatically speed up proposal and quote generation
- Rapidly increase productivity and reduce product SKUs
- Have control over discounts and processes
- Transform quoting process by providing sales with tools needed to create accurate quotes
- Connect to product catalog and populate quotes
- Enable quote-to-cash to support billing and collection

WHAT'S INCLUDED

1 Discovery + Exploration

- Lead discovery sessions to gather information on existing quoting processes and structure
- Determine information to be tracked in Salesforce and ways in which teams interact with customers and prospective clients
- Understand key metrics and KPIs that drive revenue
- Summarize findings and learnings through Business Requirements documentation

2 "The Jumpstart"

- Configure CPQ to align with your desired quoting process by utilizing core components of CPQ such as price books, products, quotes, quote line items, and contracts
- Configure quote bundling and quote line editing
- Create a reusable quote template
- Configure automation and approvals that align with your desired quoting process
- Organize CPQ page layouts, custom account fields, opportunities, products, quotes, quote line items, and contracts

3 Training

- Conduct training sessions for super users and trainers so they are prepared to conduct end user training
- Create and share training material related to the CPQ jumpstart configuration

4 Readiness and Support

- Support user acceptance testing (UAT)
- Conduct and support the production go-live
- Support the sales team post go-live

WHY TURNBERRY?



The nation's leading companies partner with Turnberry for our holistic approach to Salesforce solutions, flexible engagement model, and top Salesforce talent of all levels. Turnberry's Salesforce capabilities combine all the perks you get from a large-scale system integrator, like national reach and breadth of expertise, with all the benefits of a boutique player, including flexible engagements and exceptional talent.

You can rely on our team's deep expertise in the manufacturing, legal, healthcare, and life sciences industries, and our proven track record helping clients realize the value of their Salesforce investments.

Already using CPQ? Turnberry offers a variety of packages to reevaluate and optimize your existing Salesforce products. Reach out to info@turnberrysolutions.com to learn more.