



# Thomas Addison

Founder & CEO at ServiceOcean



“ Cloudity is a very reliable partner who takes full responsibility and really understands and challenges the needs of our business.

Their technical skills in setting up the Salesforce system are impeccable and they create future-proof solutions.

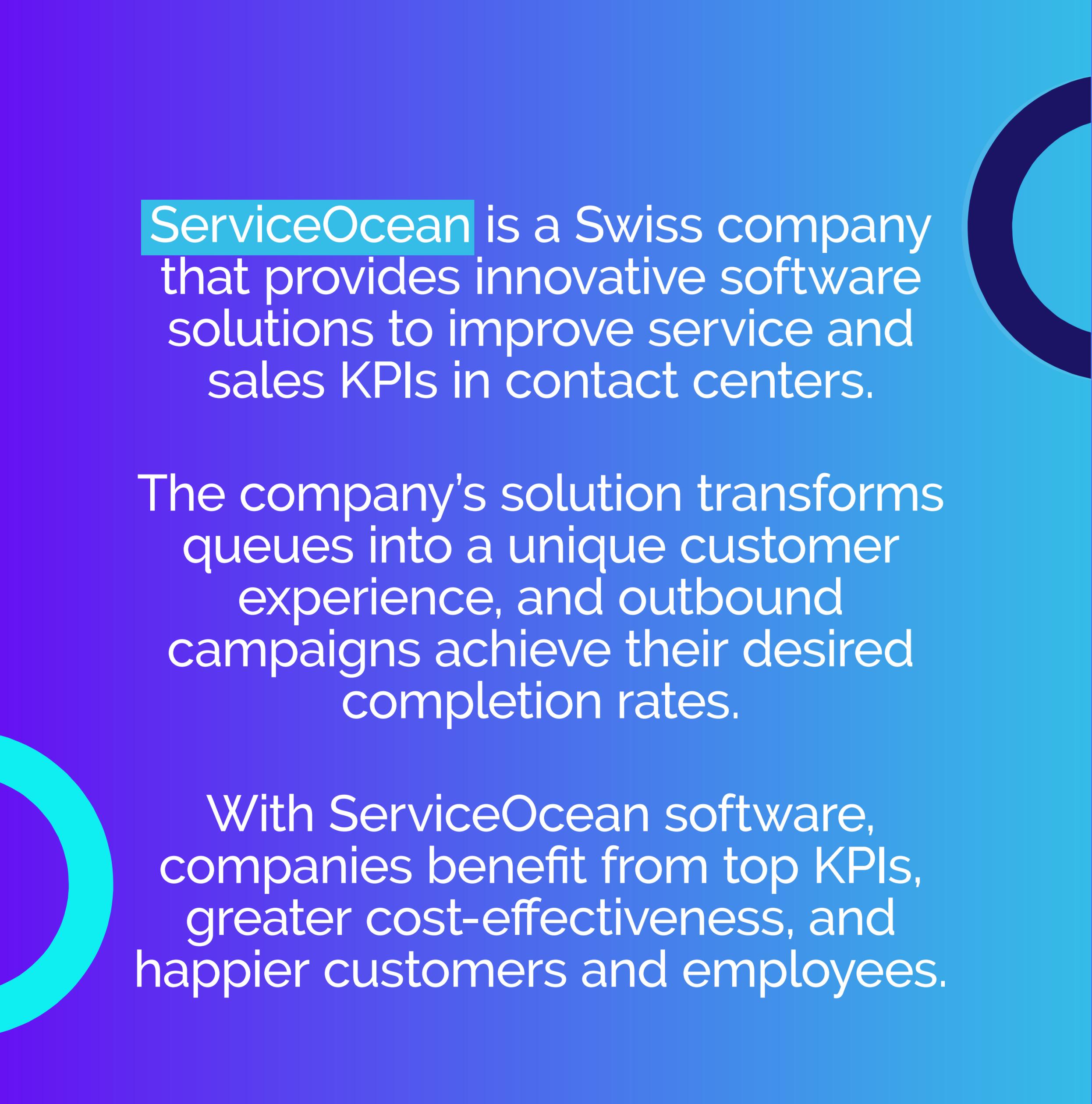


service  
ocean

# Streamlining the lead-to-invoice process with Salesforce

salesforce





**ServiceOcean** is a Swiss company that provides innovative software solutions to improve service and sales KPIs in contact centers.

The company's solution transforms queues into a unique customer experience, and outbound campaigns achieve their desired completion rates.

With ServiceOcean software, companies benefit from top KPIs, greater cost-effectiveness, and happier customers and employees.

# ServiceOcean's challenges:

- # company was looking for an IT partner to implement a billing solution;
- # invoices had to be prepared manually;
- # the data entry process was tedious and time consuming;
- # there were two systems used for billing;
- # the previously implemented CPQ solution wasn't scalable and responsive enough to keep up with ServiceOcean growth;
- # some customizations did not cover customer requirements.



# The goal of the project was to:

- # streamline and lightly automate quote-to-order process, create contract management, amendments & renewals;
- # create the entire invoicing process in Salesforce Billing from scratch.



# The scope of work included:

- # introducing the invoicing process into Salesforce;
- # upgrading the current Salesforce configuration;
- # enabling two types of invoices numbering;
- # several custom improvements
- # Conga Invoice Generation;
- # Salesforce user training



# Key benefits for ServiceOcean:

- # automated, simplified quoting and billing processes;
- # reduction of manual work;
- # no more need to transfer data;
- # fewer clicks needed for completing quoting and billing-related tasks;
- # the tool is ready for the upcoming tax changes (VAT rate) in Switzerland.

**Most importantly the system has been simplified and optimized, making it easier for the customer to understand it, maintaining and scale it.**





Let's talk  
about  
Salesforce  
in your  
company

CONTACT US