



B2B Storefront & Seamless Billing for Scalable Growth

Case Study—B2B EdTech Company

The Challenge



EdTech Company: Offering in-person certification and course scheduling; virtual courses and certification; in-the-field courses; OSHA courses and recertifications

Solution Area: B2B Commerce for licensing and course scheduling with integrated and self-service end to end cart to cash process without increasing accounting headcount.

Pain Points:

- Account/Contract-specific pricing rules
- Pricing buried in spreadsheets & binders
- Licensing process: over the phone with support.
 - **Average: 35 mins per purchase, existing accounts**
- Complex rules: licenses, delivery type, discounts
- Inefficient processes → low productivity & reporting errors
- Little trust in prior systems
- CEO mandate: streamline billing, improve accuracy, enable growth



The Coalescence Solution

Coalescence Cloud, Inc. integrated the company's accounting system with automated billing, leveraging Salesforce, Certinia and Conga.

- **Products**
 - **Salesforce B2B Commerce, Service, and Sales Cloud**
 - **Certinia FM, Billing, OPI, & PSA**
 - **Conga Composer & CLM**
- **Custom CPQ Solution:** dynamic pricing based on licenses, training type, discounts
- **Asperato integration** for seamless payments - Credit cards and direct bank (GoCardless)
- Automated accounting (deferred journals, cash matching, revenue recognition)
- **Scalable architecture** to support growth - New product SKU's and pricing models.



The Implementation



- **Initial Assessment:** 1-month embed to map processes & pricing models
- **Execution of Strategy:**
 - Automated invoicing & reporting
 - Billing automation with custom pricing rules (cut purchasing time from 35 minutes → under 1 minute per transaction)
 - Accounting automations: deferred journals, cash matching
 - Asperato integration for online payments
- **Monitoring & Support:** Ongoing enhancements, training & scalability

Project Results

- **30-40% year-over-year revenue growth** (eliminated revenue leaks i.e. unbilled certifications, pricing errors, etc.) through automated billing, payments, and accounting processes.
- **CPQ automation** → pricing accuracy, faster quotes for bulk purchases
- **Streamlined contracts:** quick renewals & revisions.
Reduced renewal process from 1 week to 15 minutes.
- **Integrated accounting:** automated journals, deferred revenue, cash matching
- **Real-time visibility:** billed vs unbilled items
- **Automated workflows:** Reduced headcount (12 FTE temps to 3)



“It’s been quite a journey, and the Coalescence team members were our partners throughout the process. Not only do I recommend them, but we have also initiated several new projects with them.”

-Senior Accounting Director, EdTech Company

Through automation and integration, Coalescence Cloud, Inc. transformed billing from a manual, error-prone process into a **streamlined, scalable engine for growth**. This solution not only improved billing accuracy and efficiency but also gave the client’s team more time to focus on **strategic initiatives and customer experience**—positioning the company for long term expansion.

