



Salesforce **Agentforce** Revenue Management

Key Things to Know

ARM is the new CPQ.

Salesforce Agentforce Revenue Management (ARM) is the next generation of CPQ (configure, price, quote). It's a higher-performing, API-first and data-driven approach that overcomes the limitations of traditional CPQ by transforming the way organizations manage revenue.

ARM provides a single source of truth for products, product configuration, pricing, approval, documents, orders and assets. It includes key revenue workflows for quoting, order-management, billing and asset management for an overall end-to-end revenue platform. Additionally, ARM's AI-powered customer insights, real-time revenue analysis, and revealing dashboards enable next-level decision-making, selling, and profitability. Simply put, ARM is a high-reward, essential investment for long-term growth today.

ARM is a major evolution, not just new features.

ARM is a significant step forward in revenue optimization that positions companies for whatever comes next. That gives

Agentforce Revenue Management faster processing plus greater flexibility and scalability. In practical terms, ARM accelerates

quote generation and supports more complex use cases without the limitations of traditional managed packages.

ARM's:

- **API-first technology** enables easy customization and integration with external systems plus enhanced UX throughout an omni-channel environment.
- **Constraint-based configuration engine** is highly composable with better pricing logic and child configurations for faster, easier, and more deeply tailored product quotes with fewer errors.
- **AI-integrated revenue agents** accelerate sales by automatically generating accurate quotes, surfacing upsell opportunities, and reducing time spent on manual configuration.
- **Order orchestration with DRO** (Dynamic Revenue Orchestration) ensures faster, error-free fulfillment by automating complex order flows across systems.
- **Detailed asset-lifecycle-management data model** enables stateful views and tracking of assets for precise measurement of ARR and MRR over time, improving forecasting and renewals.

10 Ways ARM Exceeds Revenue Cloud CPQ and Subscription Management

1. **Greater Revenue Potential.** ARM creates new selling efficiencies that speed up deal closures like multiple selling models or attribute-based configuration and pricing.
2. **Higher Performance & Scalability.** ARM processes 1,000+ line items for complex pricing without bottlenecks.
3. **Streamlined Selling.** ARM reduces friction in the sales process by simplifying quotes, renewals, upgrades, and cancellations.
4. **Price Waterfall Calculation.** ARM takes list prices and automatically applies discounts, incentives, and adjustments in a structured, smart sequence—ensuring transparent, optimized pricing every time.
5. **Seamless Omnichannel Selling.** ARM centralizes and governs products, pricing, availability, and contract compliance across all channels.
6. **Advanced Self-Service.** ARM's out-of-the-box UIs guide customers to the right products and suggest the right pricing, accelerating the purchasing journey. With ARM's API-first architecture, additional UIs can be built to meet any user experience needs.
7. **Enhanced Billing & Order Management.** ARM integrates and automates everything—customer and product data through invoicing, delivery, payment, revenue recognition, and collections.
8. **Better Visibility for Better Decisions.** ARM uses real-time analytics and AI to track revenue performance and enable proactive, data-driven decision-making.
9. **Easier Integration.** ARM's API-first approach leverages Core platform integration patterns and standard connectors for Mulesoft to simplify data connectivity and enable seamless integration with ERPs, CRMs, and other systems.
10. **Future-proof.** ARM is continuously updated by Salesforce, so it adapts to evolving sales, subscription, and automation models. Salesforce also has the largest developer team of any CPQ solution in the market.

Configure Office & Meeting Space Solution

Product Validation ☒ Enabled Instant Pricing ☒ Enabled Compact Mode ☐ Disabled

WILLSCOT

Building Configuration



FLEX - Two Story (1600 Sq. Ft. -

\$18,000.00

The FLEX Two Story 1600 sq. ft. unit offers a compact, stackable solution. Its panelized design allows for customizable configurations for glass panels, enabling tailored layouts to meet specific needs. This unit is ideal for maximizing space efficiency on site footprints.

[View Alternate Options](#)

Bill of Materials

Qty	Item	Part Number	Unit Price	Total Price	Commission
1	Office & Meeting Space Solution	BLPRNT001	\$0.00	\$0.00	\$0.00
1	FLEX - Two Story (1600 sq. ft. - 20'x40')	P22040	\$18000.00	\$18000.00	\$1530.00
6	Professional Office Package	WSPROPI0	\$199.99	\$1199.94	\$17.00
2	Professional Workstation Package	WSPROPIW5	\$49.99	\$99.98	\$4.25

VAPS Selection

Workspaces

Office Packages

Workstation Packages

Collaboration & Breakroom

Conference, Café & Lunchroom Packages

Entrances

Steps

Basic Office Package



\$69.99 per period

Qty: 1

[Configure](#)

Professional Office Package



\$199.99 per period

Qty: 6

[Configure](#)

Premium Office



\$189.99 per period

Qty: 1

[Cancel](#)[Save & Exit](#)

Eight Steps to Successful ARM Migration

Migrating to Salesforce Agentforce Revenue Management is not a simple add-on or upgrade. It's a full-scale migration and complex transformation. Transitioning to ARM requires specialized expertise, rigorous planning, and a structured approach. Done correctly, this ensures seamless data migration, system integration, and user adoption. The following steps are vital to successful ARM migration.

1. Reassessment & Planning

Embrace the opportunity to re-evaluate everything about your current processes. Define clear objectives for your migration. Then develop a strategic roadmap tailored to your sales model for maximum efficiency and minimal disruption.

2. Data Preparation

Ensure compatibility then prepare transformations from the CPQ data model to the ARM data model. Start by mapping existing CPQ data models to ARM's advanced architecture. Clean and structure your customer, product, and pricing data.

3. Configuration & Customization

Implement ARM modules for CPQ, billing, and order management as needed to optimize and automate workflows, approvals, and contract lifecycle settings. Tailor ARM dashboards and analytics to your business needs for enhanced visibility and control.

4. Data Migration

Retrieve data from legacy CPQ systems and import structured data into ARM, being meticulous about accuracy and completeness. Migrate that data, including historical records, contracts, pricing rules, and configurations.

5. Integration & Testing

Based on the integration design, connect ARM with ERP, CRM, and other external platforms for seamless data exchange. Conduct comprehensive testing to validate pricing calculations, order flows, and billing accuracy. Provide end-user training to ensure successful adoption.

6. Deployment & Go-Live

Do final system validation, testing, and cutover activities. Deploy ARM into production. Ensure all configurations, workflows, and integrations function correctly with minimal disruption to business operations.

7. Post-Go-Live Support

Monitor system performance post-launch and address issues promptly. Gather user feedback to optimize ARM workflows and enhance automation. Continuously refine pricing strategies, reporting, and analytics to improve efficiency, productivity, and user experience.

8. Documentation & Training

Maintain updated documentation on system configurations, workflows, and new ARM functionalities. Encourage user engagement through ongoing interactive training sessions, knowledge-sharing initiatives, and support to maximize operational benefits.

Don't go it alone. Get specialized help.

Pierce Washington is a smart, safe choice for seamless ARM transitions that eliminate risk related to data integrity, revenue miscalculations, and operational disruptions. No other system integrator knows Agentforce Revenue Management better.

PW is a certified Agentforce Revenue Management specialist.

PW is a Salesforce Crest Partner and a Agentforce Revenue Management Advisory Board company with product roadmap input and direct access to Salesforce's product development team. PW has 100+ Salesforce certifications and is one of the premier and trusted partners of Salesforce Agentforce Revenue Management.

PW has deep expertise with complex global implementations.

PW has over 20 years of highly specialized experience delivering Sales Cloud, CPQ, Billing, Commerce, Service Cloud, FSL, and now ARM implementations. Our US and EMEA offices focus exclusively on transforming commerce revenue lifecycles in B2B manufacturing, tech, and life-sciences companies with complex products and services.

PW speeds and simplifies ARM adoption with proprietary frameworks.

PW has created proprietary migration frameworks and industry-specific accelerators that enable faster, easier migrations that minimize downtime and shorten time to value.

See if ARM is right for your business.

Don't let outdated CPQ and billing systems hold your business back. Unlock the full potential of Salesforce Agentforce Revenue Management. Futureproof your business and empower it to sell more easily and push revenue and profitably higher than ever.

Step one is easy. Schedule an ARM migration assessment.

PW offers a four-week, deep-dive assessment with our ARM experts. Deliverables include:

Requirements assessment

of Agentforce Revenue Management or Revenue Cloud Billing based on each businesses' requirements. (This is an overall fit assessment.)

ARM phasing

recommendations based on best practices which often begin with an initial sandbox step then a phased approach.

ARM business case & value assessment

includes review of current CPQ and billing pain points plus key business goals and objectives.

Custom demo

to showcase new functionality and user experience, as well as to further validate the business case for your ARM migration.

Migration assessment

to identify key considerations and dependencies for migrating to ARM.

Proposal for migration & ARM implementation

that is highly detailed and tailored to your unique business and goals.

Learn more or book now.

 www.piercewashington.com

Or contact us for a quick, free conversation about ARM.

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