

CASE STUDY

# Automated Quote-to-Cash for Complex Visa Services

Salesforce Revenue Cloud, CPQ & Agentforce Transformation

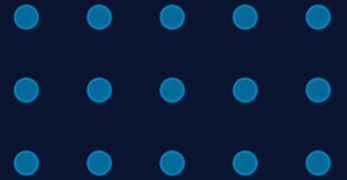
---

## INDUSTRY

Visa Consultancy Services

## TECHNOLOGIES

Sales Cloud • Revenue Cloud Advanced • CPQ • Agentforce AI



# Business Challenges

## Key Operational Pain Points



### Manual Quote Creation

Spreadsheets & email-based quote management  
Slow turnaround and pricing inconsistencies



### Complex Visa Configurations

Multiple visa types with country-specific rules  
Eligibility checks handled manually



### Approval Delays

Multi-level approvals for discounts & pricing  
Delayed deal closures impacting revenue



### Inconsistent CX

Non-standardized quote formats  
Limited visibility into customer interactions



### No Revenue Visibility

Difficult tracking of pricing & billing  
Fragmented approval and reporting data

# Salesforce Revenue Cloud Solution

Unified Quote-to-Cash Platform

## Revenue Cloud Advanced (RCA)

- Centralized visa service catalog
- Dynamic pricing & package configuration
- Eligibility-based product rules
- Guided selling for visa recommendations

## Salesforce CPQ

- Automated quote generation
- Pricing and discount rules
- Multi-level approval workflows
- Branded customer proposals

## Revenue Cloud Billing (RCB)

- Automated invoicing generation
- Payment tracking & reconciliation
- Revenue visibility & analytics
- Scheduled and one-time billing

## Sales Cloud

- Lead and opportunity management
- Customer interaction tracking
- Pipeline and deal visibility
- Seamless CRM integration

# Agentforce

AI-Powered Sales & Service Automation



## Agentforce for Sales Teams

- AI-assisted quote recommendations
- Faster visa package selection
- Predictive pricing suggestions



## Agentforce for Customer Support

- Visa eligibility assistance
- Real-time application status updates
- Automated customer follow-ups



## Intelligent Workflow Automation

- AI-driven approval routing
- Smart next-step recommendations
- Automated reminders and escalations



### Business Benefit

Reduced manual effort, faster quote turnaround, and improved customer experience across every touchpoint.

# End-to-End Quote-to-Cash Process

Automated Visa Service Lifecycle



# Reporting & Operational Visibility

Real-Time Business Insights



## Sales Dashboards

- Pipeline tracking
- Quote conversion rates
- Revenue forecasting



## Pricing & Approval Insights

- Discount analysis
- Approval turnaround times
- High-value deal monitoring



## Financial Reporting

- Invoice tracking
- Payment status visibility
- Revenue analytics



## Customer Visibility

- Complete customer interaction history
- Application and quote tracking

# Business Outcomes

Key Results Achieved



## Operational Efficiency

- ✓ Faster quote generation
- ✓ Reduced approval cycles
- ✓ Improved sales productivity



## Revenue & Pricing

- ✓ Standardized pricing rules
- ✓ Better revenue visibility
- ✓ Improved billing accuracy



## Customer Experience

- ✓ Transparent branded quotes
- ✓ Faster response times
- ✓ Improved service consistency



## Scalability

- ✓ Centralized Q2C platform
- ✓ AI-enabled automation
- ✓ Support for business growth

# Salesforce Revenue Cloud

## Success Story

- ✓ Revenue Cloud Advanced (RCA)
- ✓ Salesforce CPQ
- ✓ Revenue Cloud Billing (RCB)
- ✓ Agentforce AI

*...the organization successfully transformed its visa service operations into an intelligent, scalable, and automated quote-to-cash platform.*



## Key Takeaways

- ✓ Automated quote-to-cash lifecycle
- ✓ AI-powered sales automation
- ✓ Faster approvals and billing
- ✓ Improved customer experience