

Case Study



US based SaaS product and professional services company simplifying their product structure and usability for the sales journey for faster closure of quote process.

Challenges

7
Families

2 Level
Modularity

2
Product Types

8
Product Duplication

50+
Product Silos

0
Pricing Rules

1
Price List

0
Approval Rules

Top Pain Areas

Modularity:

- › Lack of proper segmentation of Products apart from Product Family & Product Type

Product Silos:

- › Manual configuration of Soft Bundles
- › No differentiation of Service & Billing Dates (Start/End)
- › Missing Unique Identifier (i.e., Product Code Set up)
- › Observed process disconnects (no)

Pricing Rules:

- › Manual Configuration of pricing and discounting for new & existing clients
- › Absence of Pricing Dimensions (Ex- Quantity, Opportunity Type, Closure timeframe)

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Outcome 1

Increased Product Modularity to capture Subscription or Fee (Can be expenses too).

Product Name	Family	Product-Type	Classification
AR –Enterprise	ARM	Recurring	Subscription
Data Loader Pro	ARM	Recurring	Subscription
On-Premise AutoRABIT software license	ARM	Non-recurring	Asset
Vault – Enterprise	Vault	Recurring	Subscription
Vault - Fee – Platform	Vault	Non-recurring	Fee

Outcome 2

Implemented Price Override Framework that will drive Approval Process and Oppty Type using Pricing Rules.

Product	Product Name	Family	Price Type	Classification	Product Code
	AR –Enterprise	ARM	Recurring	Subscription	ARME

Pricing Rules	Quantity	List Price	Net Price	MPO	MPO Limit	Type
	1-100	150\$	130\$	N	N/A	New Logo
	101-200	150\$	120\$	Y	105\$	New Logo
	1-100	195\$	140\$	N	N/A	Renewal

Outcome 3

Process that ensures there are no data issues which will result in correct KPI and Sales Metrics.

Drive the status based on state action buttons:

1. Send For Review (**New**): Visible for MPO Scenarios only.
2. Approve/Rejected (**As-Is**)
3. Generate PDF (**As-Is**)
4. Accepted & Denied (**New**)

KPI and Alerts framework

1. Alerts to Sales Executive (Oppty/Quote Owner) based on ageing defined and build the reports using Quote Status

System Automation

1. Once Quote is 'Accepted', System to 'Create Contract', 'Sync Oppty' and 'Create Subscription'
2. **eSignature Integration**

