

# Case Study



Global enterprise with several inconsistencies between how different countries use the same Salesforce instance w.r.t Sales Automation, Product Pricing Calculation and Contract Management.

## Challenges

- 01 Deep learning curve for the Sales Agents
- 02 Tricky business process, with inefficient Upsells and Cross Sells
- 03 Complex Quotes
- 04 Manual approval process, and delayed responses to the customer creating inconsistent customer experience

## Our Solution

Our solution started with creating a reference architecture by keeping different personas in mind.

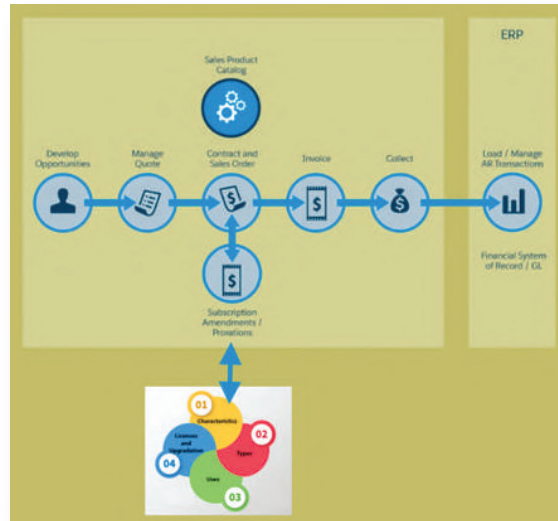
### Sales

- › Faster sales cycles from lead to close
- › More opportunities to upsell products/services
- › Faster responses to market & competitive pricing pressures
- › Increased sales time by spending less time on proposal development



## Channel Partners

- › Improving cross-channel visibility and management
- › Enabling quick roll-outs of new products and pricing configurations locally and globally
- › Streamlining channel order flow from lead to close
- › Reducing errors by allowing users to centrally access, manage, and control offer and document content



## Sales & Fin Operations

- › Reducing pricing and quoting errors through managing constraints and rules
- › Formalizing change control processes
- › Reducing risk and ensuring compliance Standardizing proposal management
- › Building process efficiencies with workflow authorization and approval process
- › Maintaining approved contract repository

## Marketing

- › Providing branded proposal documents and contracts
- › Ensuring all marketing documents have accurate up-to-date pricing and product configuration information
- › Developing customer-facing product catalogs
- › Providing sales playbooks that increase win rates
- › Providing value-based sales tools like value propositions, white papers, ROI/TOC calculators, and benefit estimators

# Outcome

One of the biggest outcome is delivering an efficient Sales Automation system right from Lead to Contract.



The screenshot shows a detailed view of a quote for 'EIMV, Slovenia - Power & Gas PLEXOS'. Key details include:

- Account Name:** Elektroinstitut Milan Vidmar (EIMV)
- Opportunity Name:** Elektroinstitut Milan Vidmar (EIMV) - New Deal - Power PLEXOS
- Quote Number:** 00003667
- Status:** Draft
- Grand Total:** EUR 210,000 (USD 215,546)
- Quote Information:** Quote Name, Owner Name (Dion Murrell-King), Status (Draft), Quote Number (00003667).
- Revenue Details:** Final First Year ARR (EUR 105,000 / USD 107,773), Final Second Year ARR (EUR 105,000 / USD 107,773), Final Fifth Year ARR (EUR 0 / USD 0), Final Sixth Year ARR (EUR 0 / USD 0).
- Quote Line Items (3):**
  - PLEXOS Electricity: License Start Date: 1/30/2023, License End Date: 1/29/2025, Terms: 24
  - PLEXOS Gas: License Start Date: 1/30/2023, License End Date: 1/29/2025, Terms: 24
  - PLEXOS Connect: License Start Date: 1/30/2023, License End Date: 1/29/2025, Terms: 24

20+

Clients

4.7



AppExchange

79+

Active Projects