

Fast growing startup deploys quote to cash process to automate their deal desk

The Client

The client for this project was a rapidly scaling SaaS business offering software solutions to multi location businesses. As a venture backed company recently taking on Private Equity financing, they were keen on improving both their demand gen process and funnels, as well as their systems stack.

The Problem

As the Business was scaling, their quote configuration and billing process was unsustainable. Sales people were confused about which products to bundle together, what discounting was permitted, and how to correctly price out their packages.

The controller spent most evenings on the couch reconfiguring incorrect quotes from sales people, and generating SOWs for the team to submit to their customers, slowing down the sales process. It was difficult for the organization to report on current customers, measure and manage churn, and ensure when renewals came up the team was renewing at the right amount based on any in-flight contract changes.

The Solution

We implemented Zuora CPQ, which uses a rules engine to ensure that the quotes sales people prepare are right every time without finance having to get involved. Using a series of record types and page layouts driven by a custom approval process, we can prevent sales people from sending quotes prior to being approved by finance should discounts exceed certain thresholds.

The A8 team was able to automatically route approvals based on different packaging configurations, making sure if Services were compiled, the implementation leads were aware before the deal made it into their queue.

We also worked to standardize their order forms and quote documents, and implement dynamic fields via Conga Composer to auto insert the relevant information for that customer. We then connected Conga Composer to Docusign, auto generating the order form for signature, and ensuring it's routed to the CFO for final signature.

The Outcome

Zuora CPQ ensures that salespeople always configure the right package with the right implementation fees, and the finance team can roll out discounting or new products with minimal change management. Using Salesforce configuration, our team was able to manage approval processes and restrict reps from sending out quotes to customers prior to them being approved, as well as auto approve quotes below discount thresholds.

Conga Composer saves sales and Finance time prepping SOWs and order forms by auto generating the right document based on what is configured. By integrating DocuSign and Conga Composer, the auto generated documents can be automatically sent for signature, tracked, and once signed we can automatically send the Quote to Zuora to initiate billing with the customer, as well as close out the opportunity.

Why Aptitude 8?

The Client was already leveraging our firm to optimize their sales and marketing funnel when they started to feel the pain of their existing closing process with the new growth in business.

We were able to spot the problem right away and start providing solutions informed by the work that was already being done with regard to their technology tools, their process, their team, and their historical data. It made perfect sense to seek the help of a partner who is not only knowledgeable of the demand gen strategy and funnel, but who is competent and knowledgeable of how systems interact with one another across the entire stack.