

# 35% Efficiency Gain by Moving from Salesforce CPQ to Revenue Cloud Advanced



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| <b>Overview</b> | Context | Challenges | Solutions | Business Outcome | Conclusion |
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## Client Overview

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| <p><b>Industry</b><br/>Software/Technology (API Management)</p> | <p><b>Region</b><br/>San Francisco, California</p> | <p><b>Company Size</b><br/>500-1,000 Employees</p> | <p><b>Featured Solution</b><br/>CPQ to Revenue Cloud Advanced Migration and Optimization</p> |
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## About the Client

The customer is a high-growth U.S. technology leader providing open-source and cloud-based API management. They specialize in helping global enterprises connect, monitor, and scale their microservices and digital ecosystems through high-performance, developer-centric platforms.

## Legacy CPQ System Hindering Scalability

The client's growth began to stall as their CPQ system struggled to keep up with increasing deal complexity and volume. What once supported straightforward quoting became a constraint as product lines expanded and pricing models evolved.

Sales teams were forced to rely on manual workarounds to configure bundles, apply pricing, and generate quotes. This not only slowed down deal cycles but also increased the risk of errors and inconsistent pricing. Instead of enabling scale, the system created friction, delaying revenue, limiting agility, and making it harder to respond to market demands.



## The Impact of a Legacy CPQ System on Business Scalability

The limitations of the legacy CPQ system began to directly impact business performance, leading to:

### Slower Deal Velocity

Manual configurations and workaround-heavy quoting significantly delayed deal cycles, reducing the team's ability to close opportunities quickly.

### Operational Inefficiencies

Sales teams spent more time fixing configurations than selling, creating friction across the quote-to-cash process.

### Scalability Constraints

The CPQ system introduced operational drag, making growth more resource-intensive and less sustainable.

### Revenue Leakage Risks

Inconsistent pricing and manual errors introduced discrepancies in quotes, leading to lost margins and reduced pricing control.

### Limited Pricing Agility

The system's inability to support subscription and usage-based pricing limited the business's capacity to evolve its revenue strategy.

## A Seamless Migration from CPQ to Salesforce Revenue Cloud Advanced

We transitioned the client from a "quote-centric" legacy tool to a native Revenue Operating System. This shift moved their operations onto the Salesforce core, removing the architectural limits that previously hindered growth.

### 1. Migration Strategy: The "Decompose & Transform" Approach

The transition followed a five-phase strategy designed to clean up legacy "code debt" and move to native automation:

- CPQ Decomposition:** Broke down legacy Product/Price Rules to identify logic to be replaced by RCA's native configuration model.
- Product & Pricing Re-Architecture:** Moved from "Product-centric" to "Pricing model-driven" architecture.
- Data Model Transformation:** Mapped legacy objects to a Revenue Lifecycle-centric model (e.g., Quote → Contract → Order → Billing → RevRec).
- Parallel Run:** Validated RCA outputs against the old system to ensure 100% accuracy in pricing and invoice generation.
- Cutover:** Successfully migrated active subscriptions, contracts, and open quotes into the unified environment.

### 2. Implementation Steps

- Catalog Transformation:** Built multi-level catalogs with reusable product structures.
- Pricing Engine Setup:** Configured tiered and usage pricing via Price Adjustment Schedules.
- Workflow Orchestration:** Set up Lightning Quote Builder and designed approval flows using Flow Builder.
- Integrated Lifecycle:** Implemented approval orchestration using Flow Builder and enabled automated contract generation with e-signatures.

## Business Outcomes That Moved the Needle

Our Salesforce-certified experts modernized the client's revenue operations by transitioning from Salesforce CPQ to Revenue Cloud Advanced. We streamlined the quote-to-cash process by eliminating manual dependencies, enabling faster deal execution and improved pricing accuracy. By automating approvals and standardizing workflows, the client accelerated deal cycles, reduced errors, and minimized manual effort. This transformation also enabled seamless management of renewals at scale, strengthening pipeline visibility and consistency. As a result, the client achieved a significant boost in revenue efficiency, turning their revenue operations into a scalable growth engine.



## Highlights

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| <p><b>35%</b></p> <p>Increase in Revenue Efficiency through accelerated quote-to-cash cycles.</p> | <p><b>45-60%</b></p> <p>Reduction in total quote-to-cash time.</p> | <p><b>25%</b></p> <p>Reduction in quote errors and manual interventions</p> | <p><b>40%</b></p> <p>Faster Deal Approvals via automated workflow orchestration.</p> |
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## Conclusion

This migration to Salesforce Revenue Cloud Advanced replaced a rigid, workaround-heavy setup with a scalable, native platform.

Modern capabilities made the difference. Integrated CLM streamlined approvals, a flexible pricing engine enabled complex models, and native billing removed external dependencies. Real-time asset tracking improved renewals, while built-in AI unlocked better forecasting and upsell visibility. With Sales and Finance aligned on a single system, the business eliminated friction, accelerated execution, and built a foundation ready for scale.

