



Optimizing Revenue and Managing Revenue Reports Effectively in Salesforce CPQ

THE CUSTOMER

The customer is a technology and services leader in identity, customer data management, and ethical use of data. They enable clients and partners from around the globe to create seamless customer experiences.

THE CONTEXT

The customer was using Salesforce Sales Cloud to manage its daily sales operations. Their sales team used to create different opportunities for upsell and renewal, both having the same Deal ID (Contract). However, when using Salesforce CPQ, they were facing some challenges in identifying upsell and renewal revenue among CPQ deals.

THE OBJECTIVE

The customer wanted to optimize their revenue reporting so that their stakeholders could get relevant insights on upsell and renewal revenue separately. However, reporting is done on the basis of Deal ID, and CPQ creates only one opportunity for upsell and renewal type. They wanted a Salesforce partner with extensive knowledge and hands-on expertise in Salesforce and Salesforce CPQ that could help them overcome this challenge and make the most of their Salesforce Sales Cloud investment.



Successfully Created Upsell and Renewal Revenue on One Opportunity



Efficient Revenue Reporting



Improvement in Team Productivity

THE SOLUTION

To initiate the process, we analyzed the customer's Sales Cloud platform, and then:



We automated the Quote Line Classification functionality so that users can easily differentiate each Quote Line for renewal and upsell.



We used the different quote lines to calculate the upsell and renewal revenue.



We helped their sales team with accurate reporting on the basis of Deal ID.



THE OUTCOME

With the expertise of Grazitti, the customer was able to get better insights into the upsell and renewal revenue. Also, now they could calculate the revenue for renewal and upsell opportunities separately and with the utmost ease in Salesforce CPQ. They witnessed that their team had become more efficient as they were spending minimal time on creating different opportunities.

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SCAN CODE

