

# Optimizing Salesforce Sales and Service Cloud for Efficient Software Price Quoting

## HIGHLIGHTS



Seamless Adoption of  
Multidimensional Quoting  
Functionality



Implementation of New  
SKU Pricing



Successful Migration of Legacy  
Software to the Cloud

## THE CUSTOMER

The customer is a US-based software and data solutions provider to fire departments, hospitals, and agencies providing Emergency Medical Services (EMS). They strive to improve community health and safety with their innovative and user-friendly software products. Their software products also help accomplish reporting, management, clinical, and operational functions.

## THE CONTEXT

The customer had made a substantial investment in Salesforce CPQ, which was initially used for managing bundles, block pricing, quote generation, and contracts. Although the customer was previously using 12 monthly subscription deals, adapting to the single-year deals was a bit challenging. They wanted to switch to a more flexible pricing functionality like Multidimensional Quoting (MDQ) within Salesforce CPQ. The customer also wanted to revamp their legacy system and technological infrastructure to manage an overwhelming amount of data generated by their users. They also wanted to improve the security, scalability, and flexibility of their software by migrating to the cloud.

## THE OBJECTIVE

The customer wanted to meet multiple objectives.

1. They wanted a more flexible approach toward handling single-year deals

2. They were looking to adapt the Multidimensional Quoting (MDQ) functionality within their pricing options.
3. The customer aimed to overhaul their existing legacy infrastructure to effectively manage the massive generation of user data.
4. They wanted to migrate their traditional software to the cloud to achieve greater software security, scalability, and flexibility.

## THE SOLUTION

Team Grazitti helped the customer -

1. Conduct preliminary testing using functional recommendations and documentation for test scenarios, test cases, and test results.
2. Manage new SKUs, product families, and pricing based on new tiers and updated uplifts.
3. Implement Multidimensional Quoting (MDQ) to set up more flexible plans based on subscribed products as opposed to subscription plans and renewal processes on multiple-year deals.
4. Leverage the fixed product prices capabilities of MDQ to apply discounts for multiple years and calculate the discounted price according to the particular year shown in their quote process.
5. Simplify the invoice generation process by sending text suggestions on Conga templates.

## THE OUTCOME

The customer was able to achieve a 100% bug-free software update and cloud migration. This has significantly increased their work efficiency and eliminated the cumbersome process of creating multiple contracts and seeking renewal approvals. The customer also witnessed a seamless management of multi-year deals on a single UI.

Furthermore, by incorporating the following new aspects into their system, the customer witnessed exceptional results and greater efficiency:

- Discounts
- Tier-Based Calculations
- Change Requests
- New SKU Pricing
- Approval Processes
- Conga Templates
- Multidimensional Quoting (MDQ)
- Segmented and Non-Segmented Tables
- SKU-Updated Product Families
- Delayed Dates
- Subscriptions
- Order and Opportunity Products
- Annual Recurring Revenues