Grazitti Interactive®
Marketing for Digital Natives

Streamlining Sales Operations With Salesforce CPQ to Achieve 15% Improvement in Quote Efficiency

HIGHLIGHTS

15% Improvement in Quote Efficiency

20% Reduction in Manual Operations and Errors

Significant Improvement in Discount Calculations

Simplified Upsells, Contract Amendments, and Early Renewals

THE CUSTOMER

The customer provides a cloud platform that streamlines security operations and reduces compliance costs by delivering on-demand security and automates auditing, compliance, and protection of IT systems and web applications.

THE CONTEXT

The customer was using Salesforce CPQ and still the sales representatives spent significant time manually, to manage complex calculations in Excel sheets. The customer had a unique use case and wanted to use Salesforce CPQ effectively. Additionally, handling upsells, renewals, and contract amendments with numerous changes (product additions, quantity adjustments, and term updates) became challenging.

THE OBJECTIVE

The customer had the following objectives:

- To have more control over discount updates for each product.

- Provide sales reps with the visibility of calculation and application of discount for each product.

- Allow sales reps to input a fixed target amount decided by the customer

- Streamline complex calculations, reduce manual efforts, and minimize the chances of errors.

THE SOLUTION

After analyzing the customer's goals, team Grazitti:

- Enabled line-level discount on quote lines, empowering sales reps to update discounts for each product individually.

- Built new discount calculation columns on quote lines, giving sales reps clear visibility into discount calculations for each product.

- Implemented validation rules to guide users and prevent edits that could impact the overall quote.

- Introduced a Target Customer Amount option, enabling sales reps to input a fixed target amount. This automatically adjusted discounts to meet the target amount, simplifying the quote process.

THE OUTCOME

With Grazitti's help, the customer was able to align Salesforce CPQ per their needs. This empowered their sales reps with streamlined discount calculations, improved visibility, and simplified deal closures. Sales operations became more efficient, reducing errors and manual effort by 20%. The provision of target customer amounts improved quote efficiency by 15% and accelerated the sales cycle.