aMind Transforms Quote-to-Cash Leveraging Salesforce CPQ & Billing

Replaces Zuora Quotes and Billing with SF CPQ & Billing for multi-channel enablement across Sales & Customer e-commerce.

GORDIAN
a Fortive Company

Background

Industry: Technology – construction/facilities management
Headquarters: Greenville, SC.
Founded: 1990
Ownership: Public (a Fortive Company), NYSE: FTV
Salesforce CPQ and Salesforce Billing

Business Challenges

- Growth through acquisitions resulted in multiple software systems serving clients across channels.
- Increased maintenance costs, impeded business processes, and poor flexibility.
- No 360-degree view of customer.
- Inflexible legacy back office tools created friction in ordering processes, hampering growth and customer satisfaction.

- Lack platform and strategy, requiring a complete business transformation.
- Unable to provide customers with self-service/poor online storefront experience increased the cost of sales.
- Quote and configuration errors don't surface until provisioning.

Project

aMind put in place an IT transformation strategy to upgrade Gordian's quote-to-cash technology stack. The goal is to support the customer storefront and inside sales channels for Gordian's estimating business. The project will roll out in phases.

Phase 1

- Replace Zuora Quotes & Zuora Billing with Salesforce CPQ & Billing.
- Rollout a new eCommerce tool for self-service ordering (Magento).
- Deliver a solution for Customer Master Data Management (Boomi)

Upgrade Quote-to-cash Technology Stack

- By moving quoting to Salesforce, Gordian eliminated the time it takes for sales to manually input Opportunities and Quotes, and reduced errors.
- Retired legacy systems Zuora and decommissioned legacy order management system.

Optimize the Customer Experience for Self-service Ordering

- Delivered a revamped online storefront experience to customers in advance of Gordian's busy season for ordering estimating products.
- Drive a larger percentage of orders through the online storefront vs. inside sales.

Reduced Friction in the Customer's Quote/Order/Purchase Process

- Establish an accurate customer view in the Salesforce front office to drive the right inside sales activities.
- Put amendments and renewals in the hands of sales reps working in Salesforce vs. having to route those processes through a separate billing cloud.
- Adopted flexible patterns for product bundling, pricing and usage-based models.
- Eliminated quoting and configuration errors that didn't surface until provisioning.

> **Five stars! From focused analysis and design, through implementation, UAT, deployment and hypercare support, aMind guided our team every step of the way to Salesforce CPQ & Billing success.**
>
> **- Santosh Sreenivasan**
> **Vice President - Information Systems and Business Analytics / Gordian**

aMind
ELEVATE YOUR BUSINESS

Salesforce CPQ & Salesforce Billing
Modules and Features

Salesforce CPQ
Quotes & Orders
Contracts & Subscriptions
Advanced Approvals - Quotes
Quote Templates

Salesforce Billing
Invoices & Credit Notes
Electronic Payments & Refunds

Salesforce Extensions
- Automated / touchless subscription renewals.
- Framework for Salesforce integration.
- Best practices using declarative "notify and callback" pattern without code.
- Heavy use and leverage of Dell Boomi AtomSphere.
- Framework for marketing-controlled effectivity for sales promotions.
- Framework for customer-facing and internal notifications based on billing-related events.
- Automated conversion and migration of historical Zuora subscription data into CPQ/Billing.

Countries
North America

Channels
Inside sales representatives
Customer self-service

Integration
Magento
Boomi
NetSuite