

aMind Implements Salesforce CPQ at Remind Days before Unprecedented Growth from COVID-19 School Closures

Replaces Zuora Quotes with fully-automated website-lead-to-quote within Salesforce CPQ. Eliminates sales quoting inefficiencies, shortens time to close, and boosts management reports and customer satisfaction.



Background

Industry: Education Technology

Headquarters: San Francisco, California

Founded: 2011 – 30 million monthly users. Used in over 80% of U.S. public schools.

Salesforce CPQ

COVID-19 Story

Perfect Timing for Distance Learning

The day Remind launched their new Salesforce CPQ system was the same day that schools began shutting down in response to the COVID-19 pandemic. Suddenly, their already-critical service for connecting educators, students, and parents became the primary tool for distance learning—and Remind was inundated with inquiries from schools and districts.

Remind's mobile-first platform is often the only way teachers can keep in touch with

students and their families, especially those without laptops or internet access. COVID-19 made it crucial for Remind to help schools and districts get set up as quickly as possible.

With Salesforce's robust CPQ platform, which enables seamless support for all types of transactions, quotes, renewals, pro-rating, and amendments, Remind replaced awkward workarounds and manual processes that were slowing down purchases—and the communication vital to supporting distance learning.

Business Challenges

- Rapidly growing startup outgrows Zuora Quotes. Requires a quoting solution that scales with the business and supports paid features, such as subscriptions.
- Management lacked visibility to KPI's needed for optimal decision making.
- Integrate with website to support self-serve as well as the sales-driven process.
- Time-consuming and error-prone manual sales process and workarounds extended the time to develop quotes, and led to errors.
- Requires a single source of revenue recognition data for Finance billing and reporting.
- Support integration to DocuSign, Marketo, Outreach.

Technical Challenges

- Two separate systematic Sales flows resulted in the creation of different quote object records, which did not provide for a streamlined way to track Quotes or report on key metrics.
- Existing Zuora Quotes system did not prorate pricing, requiring sales to manually calculate prices.
- Every Remind subscription product required its own individual SKU in the product catalog.
- Support integration to DocuSign, Marketo, Outreach.
- Used static text fields that had to be checked, easy to miss.



aMind was the only vendor that took the time to truly understand our core business cases and needs. They follow a regimented approach to scoping out the work and establishing a schedule from kick-off to go-live. Will definitely work with aMind again for Salesforce CPQ work.



– Kylee Hall, Vice President, Marketing / Remind



Results

Reduced Inefficiencies and Manual Workarounds

- ✓ Sales teams sell more efficiently to customers.
 - ✓ Reduced the time to close opportunities.
- ✓ New customers are on-boarded more efficiently.
 - ✓ Improved SKU management.
- ✓ Supports more non-standard contract terms to suit customer needs.
- ✓ Provides more robust reporting and analytics capabilities to track revenue and other key management metrics.

Enhanced Employee Efficiency

Improved Management

- Streamlined sales process by replacing Zuroa Quotes with Salesforce CPQ.

Standardized Pricing and Discounting

Reduced SKU Proliferation

- aMind cleaned up and simplified Remind's product catalog. Originally every combination (30+) of Remind subscription products required its own individual SKU in the Product Catalog. By leveraging a Bundle Product with Product Options, aMind reduced subscription products to 5 SKUs in the Product Catalog.

Seamless Sales Process

- A lot of processes that were followed involved manual intervention. That has been almost totally eliminated, with the exception of certain types of website self-service quotes.

Reduced Time to Quote

- The right products, pricing, controls for discounting and generation of forms are all streamlined in Salesforce CPQ.

Enhanced Reporting

- Streamlined reporting in Salesforce for ARR, churn, forecasting, etc.

Salesforce CPQ Modules and Features



Salesforce CPQ

Quotes
Product Bundles
Contracts & Subscriptions
Quote Templates
DocuSign for Quotes
Salesforce (Standard) Approvals (not CPQ+/
CPQ Advanced Approvals)



Extensions

Parent/Child Accounts for school districts and schools, extended with student information that drives pricing.

"Multi-Location CPQ" extensions so they sell 1+ bundles of services to the school district, but track which schools get which bundle and price the bundle based on total students in those schools.

Automated migration of active customer subscriptions into Salesforce.

Fully-automated website-lead-to-quote.

Fully-automated subscription renewals process.

Increased Profitability

Improved Sales

- Increased sales productivity, quality, throughput of sales outputs and reduced manual processes. Remind is now able to serve more customers with a better buying and renewal process.

Reduced Time to Quote

- The right products, pricing, controls for discounting and generation of forms are all streamlined in Salesforce CPQ. This leads to shorter sales cycles and faster revenue recognition.

Accurate and Timely Product Discounting

- The ability to discount and price is significantly improved. CPQ processes now drive discounts, instead of manual calculations to an eighth decimal place.

Automated Product Renewals

- Each renewable product is on the subscription, as opposed to a variation of each SKU for all product combinations.

Slashed Quote Preparation Time

- By moving quoting to Salesforce, Remind eliminated the time it takes for sales to manually input Opportunities and Quotes, and reduced errors.

Increased Customer Satisfaction

- Improvements in productivity allow Remind to serve more customers while increasing retention.

Improved Quote Accuracy

- Reduced discounting and approval errors, previously managed through email.



Countries

North America



Channels

Internal Sales
Sales Agents



Integration

DocuSign Managed Package
Customer Self-service
from Public Website