

Driving Operational Excellence

**Salesforce Transforms Global Professional Services
with 30% Faster Quotes and 40% Efficiency Gains**



Client: Global Professional Service Providers



30% Faster Quotes:
Implemented dynamic product bundling with pre-configured dependencies, reducing the end-to-end quote time.



40% Effort Reduction in Post-Sales and Customer Retention:
Automated processes improved both customer retention and operational efficiency.



25% Quicker Case Resolution:
Integrated systems streamlined processes, minimizing toggling between systems and enhancing service efficiency.



25% Boost in Net Revenue Efficiency:
Utilized business performance dashboards for enhanced decision-making and overall business performance.

Executive Summary

Faced with rapid growth and shifting global dynamics, our client embarked on a transformative journey to elevate their sales and customer service capabilities. By strategically consolidating their CRM with Salesforce Sales and Service Cloud, the initiative delivered significant results.

The implementation led to a **30% reduction in end-to-end quote time** through dynamic product bundling with pre-configured dependencies. With integrated systems, **the case resolution time was slashed by 25%**, providing employees with a seamless service experience. Automation in post-sales and customer retention processes yielded a **40% reduction in efforts**.

Furthermore, the use of business performance dashboards contributed to a **25% efficiency gain on net revenue**, empowering informed decision-making and driving substantial improvements in business performance.

Background

A global Professional Employer Organization struggled with disconnected Sales and Service systems, lengthy product configuration times, and fragmented analytics. These challenges hindered the management's ability to capture critical business metrics and made scaling operations difficult.



Solution: Revolutionizing Customer Engagement

Our comprehensive solution introduced a robust sales platform that streamlined product bundling and dynamic quoting, ensuring agile and accurate pricing for customers. A unified service platform enabled seamless case resolution, eliminating the need for system switching. Advanced analytics and dashboards equipped management with cohesive insights, driving strategic planning and improving operational efficiency. This holistic approach optimized sales processes, enhanced service operations, and delivered superior business outcomes.

Scalability and Future Readiness

By leveraging Salesforce Sales and Service Cloud, our client ensured their solution was scalable and adaptable to future industry demands. With a focus on continuous innovation, the organization is well-positioned to maintain market leadership and consistently exceed customer expectations.



Business Outcomes



Streamlined Sales Processes

- **Salesforce CPQ Implementation:** Simplified product bundling and dynamic quoting boosted sales efficiency by 20%.
 - **Dynamic Product Bundling:** Reduced quote time by 30%, enabling quicker pricing decisions and shorter approval cycles.
 - **Guided Selling Flows:** Accelerated sales manager onboarding, cutting training time by 30%.



Unified Service Platform

- **Integrated Systems:** Reduced case resolution time by 25%, delivering a seamless and efficient service experience.



Enhanced Management Insights

- **Salesforce OOB Dashboards:** Provided intuitive analytics, enhancing senior management decision-making and contributing to a 25% impact on net revenue.



Conclusion

The adoption of Salesforce CPQ significantly optimized sales processes, boosting efficiency by 20%. Dynamic product bundling slashed quote times by 30%, while streamlined pricing accelerated decision-making across 30% of opportunities. Guided selling flows reduced sales manager onboarding time by 30%. The unified service platform decreased case resolution times by 25%, while enhanced insights from Salesforce dashboards increased net revenue by 25%, driving substantial improvements in operational efficiency and overall business performance.



About Altimetrik

Altimetrik is a pure-play digital business services company. We focus on delivering business outcomes with an agile, product-oriented approach. Our digital business methodology provides a blueprint to manage data and develop, scale, and launch new products to market faster. Our team of 6,000+ practitioners with software, data, cloud engineering skills help create a culture of innovation and agility that optimizes team performance, modernizes technology, and builds new business models. As a strategic partner and catalyst, Altimetrik quickly delivers results without disruption to the business.