Accelerating Quote-to-Cash Velocity through Salesforce-Powered Automation

The Customer

A prominent Managed Service Provider (MSP) delivering IT solutions and services to various industries. Their goal is to drive efficient operations and enhanced service delivery through cutting-edge technology integration and automation.

The Challenge

The client was struggling with several operational inefficiencies:

- Inefficient CPQ System: The slow Configure, Price, Quote (CPQ) process delayed sales cycles, impacting revenue generation.
- Duplicate Case Creation: The customer support department faced challenges with duplicate case creation, leading to confusion, extra workload, and decreased service quality.

The Solution

CriticalRiver implemented a powerful Salesforce-based solution to address these challenges:

- Automated Quote-to-Cash Process: Salesforce CPQ and Logisense integration automated the sales and financial workflows, optimizing the quote-to-cash process and improving accuracy.
- Workato Integration for Case Management: Workato integration ensured seamless ticket management, eliminating duplicate case creation and improving service operations.
- Additional Enhancements: CriticalRiver enhanced the professional services automation, streamlining service delivery and improving user experiences on partner and customer portals.

The Results

With CriticalRiver's customized Salesforce solution, the MSP significantly enhanced its operational workflows. Automation reduced manual processes, improved service delivery, and accelerated sales cycles, positioning the company for future growth and operational success.

Impact Delivered

- 40% Faster Processing Time
- 30% Faster Quote Approval Process
- 50% Increase in Billing Efficiency
- 20% Improvement in Operational Efficiency

Solution Components

- Salesforce Sales Cloud
- Salesforce Service Cloud
- Salesforce CPQ
- Salesforce Financial Cloud
- Logisense for Billing Integration
- Workato for Automation
- Salesforce Analytics