

Accelerating Revenue with Unified CPQ and Guided Selling



The Customer

The customer is an American building materials company who recently went public via a SPAC (Special Purpose Acquisition Company). The company specializes in technology that improves human well-being, reduces energy usage and environmental impact, and provides financial benefits for building owners. Their smart windows feature AI-powered adjustments based on sun exposure, resulting in increased natural light and views, reduced need for blinds, and minimized heat and glare. The technology is integrated with a customizable, cloud-connected building platform for an enhanced user experience.

The Challenge

The customer aimed to improve its sales process and enhance the sales team's experience when working with prospects and customers. The goal was to implement Salesforce CPQ, a custom guided selling system, and simplify the data model to access relevant information and reduce the use of custom fields on standard objects such as Opportunity and Opportunity Line Items.

The Solution

CriticalRiver's expert architecture team redesigned the data model and streamlined the sales process. The company's UI/UX and Salesforce developers also worked closely with the client to create reusable LWC and Apex components that increased productivity and user experience.

The Results

- Redesigned sales process improved user experience
- Implementation of Salesforce CPQ reduced time to create quotes with multiple options
- Data model overhaul provided better visibility into data
- Dynamic Apex and LWC components allow for quick and cost-effective solution to future business needs
- Better data insights lead to informed decision-making by management

Impact Delivered

- 65% increase in the overall productivity of the sales team through the implementation of guided selling in the sales process
- 55% increase in the count of quotes delivered
- 70% improvement in pricing quality was achieved through the implementation of Salesforce CPQ

Solution Components

- Sales Cloud
- Service Cloud
- LWC
- CPQ
- HTML
- Javascript
- Apex Classes
- Triggers
- Flows