



WHITE PAPER

# Managing the Complex Requirements of Your Quote-to-Cash Tech Stack

Guide to Maximizing the Benefits of Salesforce Revenue Cloud Operations

A seamless customer experience (CX) is mission critical to win and keep business in today's hyper-competitive, digitally transformed marketplace. And nothing is more central to a seamless CX than getting fast, accurate and consistent information all the way from the first quote through the invoice.

But creating a friction-free CX can be a rough undertaking for many enterprises. Each step in configuring, pricing and quoting a product through to billing involves applying complex business rules, ensuring data is correct and executing business processes in a specific order. Industry best practice for making all those steps seamless is to replace legacy, separate and often unreliably integrated systems with a single platform that can harness critical data and business rules quickly and accurately across the quote-to-cash (Q2C) process. Salesforce Revenue Cloud incorporates products such as Configure-Price-Quote (CPQ) and Billing to achieve this seamless process.

## Salesforce Revenue Cloud incorporates products such as Configure-Price-Quote (CPQ) and Billing to achieve a seamless CX process.

While Salesforce Revenue Cloud can help completely transform an enterprise's CX, successfully reaching that goal isn't a guarantee. To avoid the setbacks and delays that can impact such a complex rollout, maximize the benefits of the investment and create the best possible configuration of Revenue Cloud for their specific needs, enterprises need to choose the best-qualified partners from the Salesforce AppExchange. Expert tax calculation, a seasoned implementation partner and agile application change management tools are all essential elements of a well-deployed Q2C platform, so it pays to choose these partners thoughtfully.



## Why Improving Q2C is Essential

**M**any enterprises have cobbled together Q2C systems from legacy technology that, for a moment in time, worked for the products they offered, the size of their customer bases and other business conditions. But in addition to the typical challenges of maintaining technologies over time, legacy systems are now being asked to accommodate all sorts of new business needs: Not just new products, but also new sales formats such as subscription, bundle, self-service or usage-based buying. Many find their current environments inflexible, unscalable and unable to keep up with fast-evolving tax rules, market demands or customer needs.

When the CPQ, Billing and other systems that are part of the Q2C cycle don't perform as needed, bottlenecks occur that make the customer's experience anything but seamless. These include manual and error-prone data entry, the risk of tax non-compliance, quoting and billing escalations, lengthy complaint resolution, extended Q2C cycles and losses associated with dissatisfied customers. Those challenges, plus the inability to innovate to meet market demands, multiply the damage.

**Businesses need to support multiple sales channels and shorten overall sales cycles to remain competitive as companies win deals by providing quotes and offers faster than their opponents.**

Source: [Nucleus Research](#), CPQ Technology Value Matrix 2020





## A Single Platform for a Seamless Experience

A Q2C platform like Salesforce Revenue Cloud frees enterprises of legacy system limitations by creating a framework on which they can build flexible solutions and seamless experiences for customers. But flexibility does not come out-of-the-box and ready to deploy. To deploy successfully and deliver the desired results, solutions in Salesforce Revenue Cloud must be meticulously configured to incorporate all the unique subtleties of each company's processes and IT stack. That's not something most enterprises have the skills nor experiences to do in-house.

Apps on the Salesforce AppExchange provide Salesforce Revenue Cloud customers with access to experts and add-ons in each of

the configurable aspects of the suite. This helps enterprises achieve the best-fit result faster and smoother, and ensures their newly configured solution will be able to grow and change with their business. Salesforce ensures that ISV partners in the AppExchange ecosystem adhere to the same high standards and stringent technical and security requirements as Salesforce Clouds themselves, and partner solutions have been certified for functionality and compatibility.

Here are some key things to know when choosing expert tax calculation, a seasoned implementation partner, and a change management tool from the AppExchange ecosystem to ensure a successful implementation.



## Getting Sales Tax Right

Sales tax calculation may not be top-of-mind when it comes to the Q2C cycle, but it's one that, if not handled properly, can wreak havoc on both the transaction and the customer relationship, and cause lots of back-end costs. Sales, use and VAT tax calculation is a fine art that depends on getting all the right information about the customer, the product, where it's being shipped from and delivered to, as well as keeping on top of the subtleties of constantly changing tax regulations, whether in the U.S.' more than 10,000 sales tax jurisdictions or across the world.

In the Q2C process, tax must be calculated quickly and accurately every time, whether it's a salesperson revising a quote, a customer changing the shipping address on a subscription or finance generating an invoice. Without an expertly maintained sales tax calculator tightly integrated into every step of the Q2C process, enterprises risk delays, errors and tax liability, increase their process and staffing costs, and elevate their audit and non-compliance risk.

As part of the AppExchange ecosystem, Vertex offers connectors for Salesforce CRM, CPQ and Billing, as well as many other enterprise software platforms. Whenever required, these solutions automatically call out to the Vertex system to calculate the tax amount and quickly



get an accurate figure, leveraging a single Vertex environment over multiple integration points to ensure consistency across systems and channels. In addition to streamlining the CX and assuring tax compliance, Vertex's connectors deliver internal efficiencies for enterprises: fewer resources needed to maintain tax data or resolve discrepancies, and a single tax solution to manage.

As the business inevitably evolves, the Vertex connector easily accommodates changes and new integrations. So choosing Vertex as an add-on to Revenue Cloud is a savvy route to smooth tax transactions across the entire Q2C cycle.

## Successful Implementation Is All in the Details

**Q** 2C processes lie at the heart of a business, and like heart surgery, making changes to it requires depth of experience and a deft hand. Every implementation is different: Each company may have unique business processes, complex use cases and massive data stores requiring migration. CPQ and Billing deployments are very complicated activities, with multiple steps that need to be executed in a very specific order. If done incorrectly, they can cause significant, cascading problems that can require hundreds of hours of rework.

Experience and flexible implementation methods are paramount; many portions of Revenue Cloud involve detailed understanding of how a project is built, and these are unique to the team doing the build. Creating a step-

by-step implementation plan won't work when a project is built iteratively by a large number of resources. Instead, a skilled integrator approaches implementation with a solid but more flexible strategy, knowing the project will inevitably deviate from initial expectations in some way.

Seasoned integrators such as ATG Cognizant bring lessons and insights from hundreds of Revenue Cloud implementations to the table, using a defined but flexible methodology, reusable tools and templates, and a set of best practices to shorten the timeframe an implementation takes, all while increasing accuracy. The more complex the business environment, use cases and migration tasks, the more important it is to work with a highly skilled implementation team like ATG Cognizant.

**Nearly 40% of companies** have used a third-party integrator just for CPQ implementation, exclusively or alongside consultants from the vendor.

SOURCE:

**Gartner, Magic Quadrant for Configure, Price and Quote Application Suites 2019**





## Making Sure Q2C Evolves with the Business

**A** Salesforce Revenue Cloud implementation project comes to an end, but that doesn't mean the business stops changing. As internal administrators take full ownership over day-to-day responsibility for the Q2C platform, they need tools that help them make changes without inadvertently impacting the underlying logic that makes the solution work as configured.

Enter Application Operations tools for Salesforce. In the past, admins making many of the required changes to Salesforce Revenue Cloud implementations would turn to manual data migration tools to move reference data — data used solely to configure CPQ's complex logic and rules — which may constantly evolve as the business changes. This manual approach, however, opened up the potential for costly errors and dramatically slowed down turnaround times for CPQ updates.

Salesforce AppExchange vendor Prodlly replaces this manual approach with a powerful release management automation tool that helps manage complex parent/child and master/detail relationships across the multitude of objects Revenue Cloud adds. Prodlly also automatically delivers a full history of changes for compliance and auditing needs and can roll back changes if an issue emerges.

For example, an enterprise introducing a new product needs to build a new product record, associate it to the correct price book

and update or create price rules (plus their dependent actions, variables and conditions) and potentially product options, discount schedules and additional constraints, dimensions and attributes. Teams must make all these updates in a sandbox first and then manually move or rebuild the correct order to production. Prodlly makes this easier by automatically migrating the entire data schema at once and maintaining the relationships between records across organizations. When the data sets are built correctly by the admin, price rule changes can be made with the click of a button, easily moving the updates from lower dev sandboxes up to production, testing that the rules are working properly, and preventing costly errors if a mistake is published.

With the recent introduction of metadata management alongside reference data management, organizations can now configure and update all of their Salesforce data into one workflow. Enterprises using a powerful tool like Prodlly can drastically reduce the time it takes for Salesforce Revenue Cloud changes to be deployed between environments so they can pivot quickly.



## Conclusion: Maximize the Benefits of Salesforce Revenue Cloud

Creating a seamless, satisfying CX is essential to compete in today's hyper-competitive marketplace. But the purchase journey at many companies is far from optimal.

Replacing sub-optimal Q2C solutions with a single, unified platform like Salesforce Revenue Cloud can go a long way toward achieving the friction-free CX companies want — but not by itself. Selecting essential add-ons and services from Salesforce AppExchange vendor ecosystem, including expert tax calculation, a seasoned implementation partner and a change management tool, is the secret to creating a Q2C process that works for the enterprise and its valued customers.

[Click here to learn more](#)

“The Salesforce Billing team is proud to work with Vertex to bring our customers a seamless experience. Partnering with Vertex means our customers can allow their finance and tax teams to focus on higher-value initiatives while Vertex handles the tax calculation.”

—Nicole Chin, Solutions Engineer |  
Salesforce Revenue Cloud







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