



How to Enhance Your Salesforce Revenue Cloud Quote-to-Cash Process

The add-ons you need to give your business an extra operational boost.





In today's fiercely competitive digital landscape, crafting a seamless customer experience isn't just important – it's absolutely mission-critical. The key to achieving this lies in swiftly and accurately delivering consistent information throughout the customer journey, from that very first quote to the final invoice.

However, it's challenging for most businesses to create such a frictionless experience. Each stage, from configuring and pricing products to generating quotes and managing billing, involves the intricate application of complex business rules and processes. Industry best practice for streamlining this journey dictates that old, disjointed systems be replaced by a unified platform capable of rapidly and accurately handling critical data and business rules across the entire quote-to-cash (Q2C) process. Enter **Salesforce Revenue Cloud**, with its powerful tools like Configure Price-Quote (CPQ) and Billing, are designed to make this process truly seamless.

But here's the thing: while Salesforce Revenue Cloud can be a game-changer for your customer experience, success isn't guaranteed. This eBook reviews how you can maximize your existing Q2C process with Salesforce Revenue Cloud by adding the following partner ecosystem to your tech stack:

- **Vertex: A trusted leader in tax calculation technology**
- **Prodlly: An experienced implementation partner**
- **Cognizant: An agile application lifecycle management (ALM) tool**

Why Improving Q2C is Essential

If your CPQ, Billing, and other Q2C components underperform, it leads to bottlenecks that disrupt the customer experience. These issues include manual data entry prone to errors, the risk of non-compliance with tax regulations, prolonged quoting and billing processes, extended Q2C cycles, and the revenue loss associated with dissatisfied customers. Overcoming these challenges and adapting to market demands becomes nearly impossible, compounding the damage.

Many businesses have pieced together their Q2C systems from outdated technologies that once did the job but are now struggling to adapt to new business requirements. It's not just about adding new products; it's also about accommodating various sales formats like subscriptions, bundles, self-service, and usage-based buying. Most of these legacy systems are inflexible, unable to scale, and ill-equipped to keep pace with rapidly changing tax regulations, market dynamics, and customer preferences.

To steer clear of the pitfalls and delays that often accompany such a substantial change, and to maximize the benefits of your investment, careful partner selection from the Salesforce AppExchange is essential. Tax calculation technology, an experienced implementation partner, and an application lifecycle management tool are all pivotal components of a well-executed Q2C platform. So, when it comes to choosing partners, be sure to weigh your options thoughtfully.



Getting Sales Tax Right

Sales tax calculation might not be the first thing that comes to mind in the Quote-to-Cash (Q2C) cycle, but it's a critical element. If not handled correctly, it can cause significant disruptions to transactions, strain customer relationships, and lead to substantial back-end costs. Calculating sales tax, use tax, and VAT is a nuanced task that hinges on gathering precise information about the customer, the product, shipment details, and staying updated on the intricacies of ever-changing tax regulations. This holds true whether you're dealing with the vast array of over 13,000 U.S. sales tax jurisdictions or managing taxes globally.

In the Q2C process, tax calculations must be rapid and error-free every time, whether it's a salesperson adjusting a quote, a customer altering their subscription's shipping address, or the finance team generating an invoice. Without a meticulously maintained sales tax calculator seamlessly integrated at each step of the Q2C process, enterprises expose themselves to the risks of delays, inaccuracies, tax liabilities, increased operational and staffing costs, and heightened audit and non-compliance concerns.

Within the AppExchange ecosystem, Vertex offers connectors for Salesforce CPQ, Billing, Subscription Management as well as various other enterprise software platforms. These solutions automatically interface with the Vertex system to compute tax amounts swiftly and accurately, utilizing a unified Vertex environment across multiple integration points to maintain consistency throughout systems and channels. Beyond enhancing the customer experience and ensuring tax compliance, Vertex's connectors bring internal operational efficiencies, reducing the resources required to manage tax data and address discrepancies while providing a single, comprehensive tax management solution.

As your business evolves, the Vertex connector effortlessly adapts to changes and new integrations. Opting for Vertex as an add-on to Revenue Cloud is a wise approach to ensuring seamless tax transactions throughout the entire Q2C cycle.

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Successful Implementation Is All in the Details

Q2C processes are pivotal to the function and success of a business. Making modifications to these processes demands savvy expertise and precise execution. 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. Revenue Cloud transformations involve a detailed understanding of the business' requirements, which commands a team with the right knowledge and attention to detail in order to execute. Creating a rigid implementation plan with a large number of resources operating autonomously will rarely result in a successful implementation. Instead, a skilled integrator approaches implementation with a solid, but flexible strategy, knowing the project will inevitably deviate from initial expectations in some way.

Seasoned integrators such as 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 and IP accelerators to shorten the timeframe an implementation takes, all while increasing accuracy and speed to value. 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 Cognizant.

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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 changes and maintains applications.

Enter application lifecycle management tools for Salesforce. In the past, admins making changes in Revenue Cloud would turn to manual tools to set up development environments, as well as to move, test, and deploy changes to configuration data. This 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 ALM platform that provides sandbox management, sandbox seeding, data migration, version control, regression testing for CPQ, and compliance features. Its market-leading data deployment plan templates let you effortlessly manage complex parent-child and master-detail relationships across the multitude of Revenue Cloud apps. 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. After the admin or developer has correctly built the datasets, they can easily promote price rule changes. With the click of a button, they can deploy the updates from lower-level development environments up to production, test that the rules are working properly, and prevent any costly errors and downtime that could result from a bug slipping into production.

With metadata and configuration data management combined with Prodlly's powerful platform, organizations can make all their changes in one workflow. Businesses using a powerful ALM tool like Prodlly can reduce the time it takes to deploy Salesforce Revenue Cloud changes by an astounding 80%. That means they can get their pricing updates into production faster — and capture more revenue.

Conclusion: Maximize the Benefits of Salesforce Revenue Cloud

Replacing less-than-ideal Quote-to-Cash (Q2C) solutions with a unified platform like Salesforce Revenue Cloud is a significant step toward realizing the seamless customer experience that companies aspire to achieve. However, this transformation doesn't happen in isolation. The key to shaping a Q2C process that aligns with the enterprise's needs and delivers customer satisfaction lies in carefully selecting essential add-ons and services from the Salesforce AppExchange vendor ecosystem. These critical components include expert tax calculation, a seasoned implementation partner, and an ALM platform.





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