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**Business Process Transformation:
40 Percent Increase
in Sales Conversion for
a Global Communications
Infrastructure Client**

 **Case Study**

Zensar is a **Salesforce Summit Partner**

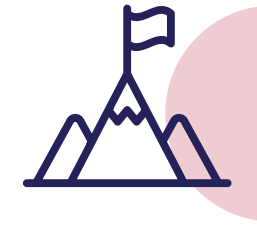


Overview

Revamping processes for enhanced efficiency and customer engagement

Our client, a US-based communications infrastructure major serving financial institutions, was facing challenges with its lead-to-order booking process. Complex integration requirements and unstructured product management posed difficulties for the client, impacting pricing, revenue recognition, and lead generation processes.

Streamlining the global application footprint, we partnered with the client to transition from a yearly to a monthly subscription-based revenue model. This transformation was achieved by leveraging the Salesforce Sales Cloud with CPQ (configure, price, quote) and billing modules.



Challenges

Unstructured financial processes and data reconciliation discrepancies

Enhancing existing business processes was pivotal in ensuring the project's success. The project identified product management and pricing processes as critical areas of improvement, given their tendency to create challenges in accurately pricing products and services. Streamlining catalogs, hierarchy, and business rules was essential to manage product offerings and capitalizing on revenue optimization opportunities.

The client's unstructured revenue recognition processes led to discrepancies across financial platforms, necessitating a more transparent and streamlined approach. The complex integration requirements posed significant hurdles in terms of effort and cost. Additionally, the lead-to-order booking exhibited inefficiencies in closing leads, highlighting improvements in customer acquisition and conversion strategies.



Solutions

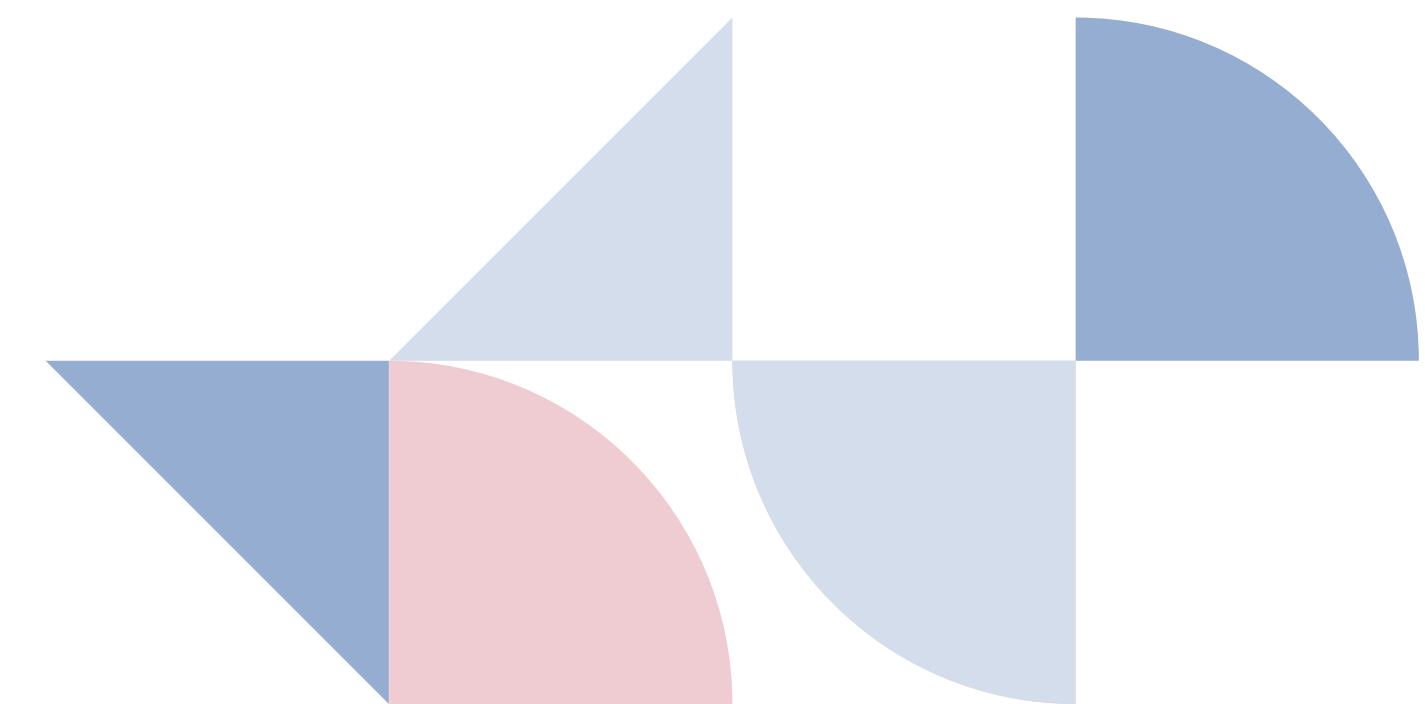
Implementing a monthly subscription-based model with streamlined sales

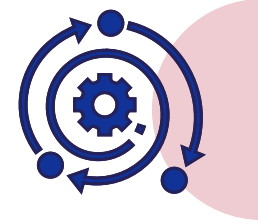
To address these challenges, Zensar implemented overarching solutions, architecture, and business process optimizations. The solution included designing a framework for shifting from annual billing to a monthly subscription model to streamline sales processes. We also helped implement reliable and reusable product and pricing structures using CPQ regional pricing, price rules, discounting rules, and approval processes to enable the client to manage product offerings efficiently and accurately.

Unifying and automating invoicing with the Salesforce Billing Platform ensured a streamlined billing process, reducing errors and clarifying reconciliation from quote to

cash. Zensar's implementation delivered a 360-degree view of the customer product suite, including product usage, payment terms, product recommendations, quotes in progress, customer queries, and payment status. In addition, dashboarding and reconciliation reporting helped the client understand customers' landscape and potential needs.

We also automated the sales and contract lifecycle via amendments and renewals native to the CPQ framework. As a result, CPQ reduced complex customer contract management and enabled the client to focus on new revenue-generating activities.





Impact

Delivering excellent customer experience and transparency in sales conversions

We successfully developed a distributor reselling portal using Salesforce Partner Relationship Management tools.

The implementation of guided selling and intelligent approval workflows significantly accelerated revenue generation and reduced the overall deal time

The client reported a **40 percent** increase in sales conversion and an **80 percent** faster accurate quote generation. These factors directly increased up-sell and cross-sell opportunities while decreasing overall deal cycle time, including amendments and renewals.

By partnering with us, our client successfully addressed costly business challenges by consolidating the global application footprint and transforming business

processes to monthly subscription-based model solutions. The client was able to streamline sales processes for internal and distributor teams and seamlessly update product offerings, driving a better understanding of its customers and directly impacting the bottom line. The benefits of these solutions are tremendous, resulting in **increased revenue, quick deal cycles, and accurate quote generation.**





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