

Focused Transformation for RCA

Sample roadmap to demonstrate investments in the Salesforce platform and enhancements by connecting to external channels allowing for more rapid return on investment.

Foundation

Foundations of CPQ and Order processes

Salesforce Functions

Quote Management | Order Management | Asset Creation

Key Capabilities / Enhancements

- Salesforce Sales Cloud
 - Account & contact setup
- Salesforce CPQ Functionality
 - Price Book setup
 - Opportunity setup
 - Quote Management
 - Approval Processes
 - Order Management
 - Asset Creation (if needed)
 - Subscription Management (if needed)
- Integration planning and strategy

Enhance

Foundation + Building a more robust platform

Salesforce Functions

Addition of Billing | Enhancements | Automations

Key Capabilities / Enhancements

- Billing component
 - Integration with ERP
 - Revenue Cloud Billing
- Salesforce CPQ Functionality Enhancements
 - Auto-create Renewal Opportunities
 - Advanced Price Calculations
 - Contract Lifecycle management
 - Advanced Order Capture for in-flight amendments
- Additional Automations and Rules
 - Faster Quoting
 - Increased Order Orchestration
 - Order Decomposition
 - Better guided selling

Transform

Enhance + Turbo-charged AI and Portal capabilities

Salesforce Functions

Addition of Fulfillment | Next Best Action | AI

Key Capabilities / Enhancements

- Einstein Next Best Action Recommendations
 - Upsell/ Cross-Sell Opportunities
 - Account based Recommendations
- Flagging at-risk Renewals with Einstein
- Agentforce Account Summary
 - Ability to see summary of past interactions and deals to gain better insights in one place
- Visibility into fulfillment journey and order status tracking
- Portal for managing Quotes and Orders
 - Clients can review and accept quotes
 - Clients can review orders and statuses
 - Agent can help client and deflect questions