

# Untangling CPQ

As a tool designed to streamline business processes by leveraging data and automation across countless industries, the Salesforce platform stands to improve outcomes across all departments and bridge gaps between them. The caveat to this powerful tool, however, is that no two businesses or business processes are the same.

Implementing the Salesforce platform requires a robust understanding of a business and the specific processes being automated with the platform's tools. Since the Salesforce platform is most often implemented by personnel outside of an organization, a customized implementation strategy becomes all the more challenging. Further, these outside Salesforce specialists often must find creative solutions to work with or around existing Salesforce infrastructure that an organization has already developed.

The following case study explores how these challenges were met by Next-Mark, a certified Salesforce Partner, as they collaborated with Roundtrip Health (Roundtrip) on a Salesforce implementation strategy.

## FIRST GLANCE

Roundtrip is a SaaS business that licenses their turnkey healthcare transportation software to healthcare systems and providers. Their client list includes some of the most respected healthcare organizations in the country, including National Institutes of Health, Johns Hopkins Medicine and American Cancer Society. The Roundtrip platform helps these clients manage non-emergency medical transportation, streamlining and simplifying the scheduling of this transportation into a single dashboard that helps clients significantly reduce no-show rates. In addition, the user-friendly platform helps patients themselves overcome transportation barriers to healthcare.

Like many SaaS businesses, Roundtrip's list of processes are highly specialized. Some of those processes include a proprietary menu of sales and contract processes that help convert new leads. "We started with Hubspot but felt that we were outgrowing it," says Roundtrip's chief revenue officer, Lindsay Tsai. "So, while our initial migration point to Salesforce was for the CRM tools, we were also looking to maximize other processes in our sales and finance departments."

With the initial assistance of their former Salesforce CRM partner, Tsai and her team set out to piece together some of these imperfect integrations, beginning with Salesforce's Configure, Price, Quote (CPQ) tool. "Our rev ops manager and our previous Salesforce consultant both had some experience with other Salesforce modules but they didn't have experience specifically with CPQ," says Tsai. While the rev ops manager and CRM consultant were indeed able to patch together an integration that offered a measure of utility, Tsai admits "it was quite a mess."

Part of the problem was a lack of clarity about the business process itself. "The shortcoming of our integration attempt came down to an incomplete understanding of the business process," says Tsai, "so our attempt didn't really hit the mark."



***"We started with Hubspot but felt that we were outgrowing it," says Roundtrip's chief revenue officer, Lindsay Tsai. "So, while our initial migration point to Salesforce was for the CRM tools, we were also looking to maximize other processes in our sales and finance departments."***

## NEXT-MARK SUCCESS STORY

### OUTSIDE HELP

When Roundtrip began a search for a new Salesforce partner to try and untangle the mess, an understanding of the business process in question was an immutable requirement. In Next-Mark, Tsai and her team found a partner that had the right aggregate of experience, expertise and curiosity. “We needed someone who could come in, ask the right questions to understand our whole model, and work with us to build on what we already integrated without starting over.”

To accomplish this, Next-Mark utilized its proprietary approach that it calls its Next Methodology. The approach breaks down the implementation process into four phases and helps establish benchmarks for the project.

#### PHASE 1: DISCOVERY

The Roundtrip project began with a deep dive into their existing CPQ integration. Tsai and her team walked Next-Mark through the Roundtrip model, the specific departments and processes that utilize Salesforce integrations, and then a methodical look at the pain points its finance department was trying to correct with the CPQ integration.

Two big takeaways from the discovery phase were that the patchwork CPQ integration was currently in use and needed to remain so, and that Roundtrip needed to get a little bit more out of it. “Our first goal was to be able to sort through the CPQ integration and find out what we could keep,” says Tsai. “The last thing we wanted to do was completely scrap it and start over.” This phase also gave Next-Mark an opportunity to fully understand the workflow of the finance department in order to ensure the customized integration worked seamlessly and provided maximum utility.

“With all of our Salesforce clients, we find that the discovery phase really sets up the kind of clarity and trust required to operate with transparency and in the client’s best interest,” says Next-Mark’s VP of Digital Marketing, J.T. Grano. “You have to listen and ask questions to really grasp the nuances of each business process.” An ancillary benefit is that the client themselves then better understands the process and its accompanying pain points.

#### PHASE 2: CONFIGURE/BUILD

For Roundtrip’s finance department, the discovery phase uncovered key processes in need of a new build or a reconfiguration of an existing integration, including contract building, contract scheduling, follow-up automation, and generating SOW documentation. For each of these integrations, it was crucial that they bridge gaps between the finance and sales departments, since each process has a sales representative attached to it.

“Some of the biggest problems we were experiencing was that certain tables weren’t working, we had issues with account management processes like renewal or upsell, and our product bundles weren’t set up in a way that made much sense,” says Tsai. This meant that rather than streamlining what are complex processes, the existing infrastructure posed an additional challenge as sales and finance personnel were frequently having to start the processes over and complete them manually.

The most notable piece of the integration puzzle was that it closely linked the sales contract process with revenue management. This meant that [the sales reps no longer had to manually submit their contract specs to the revenue department]. “That kind of efficiency is what we were the most excited about with the CPQ integration,” says Tsai.



***“With all of our Salesforce clients, we find that the discovery phase really sets up the kind of clarity and trust required to operate with transparency and in the client’s best interest,” says Next-Mark’s VP of Digital Marketing, J.T. Grano. “You have to listen and ask questions to really grasp the nuances of each business process.”***

## NEXT-MARK SUCCESS STORY

### PHASE 3: TEST

Regardless of how robust a Salesforce partner's portfolio is, an integration only brings value if it has been fully tested for operability. For Roundtrip's newly configured CQP integration, this meant a methodical, thorough assessment of all its features.

During this phase, Next-Mark stress-tested each feature in real-life simulations to ensure the correct data was being reported to the correct personnel at the correct time. One specific example was testing the contract renewal feature. Previously, renewals and renegotiations were a time-consuming, imprecise endeavor left for individual sales reps to navigate their own way. The test made sure that the renegotiated pricing, start date and end date were automatically generated with each renewal contract. "This was a really valuable integration for our team in terms of efficiency," says Tsai.

But a test is only as good as the questions asked. To that end, Next-Mark's experience with other Health and Life Sciences (HLS) clients offered the project a nuanced understanding of the unique needs of organizations in this field. "Even though our HLS experience covers everything from publishing to providers, it was helpful for the project that we already knew some of the best practices from the field," says Grano.

What is the typical length of a contract? What is the best time to generate a renewal contract? Who within an HLS organization is the best liaison for sales? What are some of the nuances of messaging for contract communications? The final design engaged with these questions and allowed Next-Mark to offer actionable insights about industry best practices while customizing them for Roundtrip's unique process pathways.

### PHASE 4: DEPLOYMENT

By the time the integration has been scrutinized and tested for functionality, the next step is to go live with deployment. Though some may see this step as the "finish line," a more apt analogy would be to view it as the removal of training wheels. Most of the hard work and granular analyses has already been done and the success of the integration now depends on how well the Salesforce partner has prepared the client for success.

In the case of Roundtrip, Next-Mark had established a relationship focused on education rather than acting as a gatekeeper to the specialized knowledge of Salesforce implementation. At every step of the way, Roundtrip was provided with all the key information required to take the integration into their own hands. "We at no point felt like Next-Mark was just trying to bill hours during the process or creating a situation where we were going to have to consult with them again and again," says Tsai.

While a reliable Salesforce partner remains on call for the initial deployment, the client themselves should be able to steward the integration with minimal intervention. "Part of our job on these projects is to essentially make sure that, with the exception of some tweaks based on feedback after extended use, they don't need to call us for fixes," says Grano.



***"Part of our job on these projects is to essentially make sure that, with the exception of some tweaks based on feedback after extended use, they don't need to call us for fixes," says Grano.***

### CONCLUSION

Like every integration in the Salesforce toolbox, CPQ offers businesses a powerful tool to improve efficiency through data collection and automation—but only when it's designed and implemented correctly. It's important to consider, however, that "correct" is a subjective term based on the business model and the business process. For Roundtrip, the ultimate value of the CPQ integration was maximized by the systematic approach of their partner, Next-Mark.

"What we really valued the most about Next-Mark and what we'll continue to look for in any partner is someone that can understand what we're asking for, assess where we are at that moment, and collaborate with us on the best way to get there without completely starting over," says Tsai. "Next-Mark was really thoughtful with their approach."

## Next-Mark's

### Next Methodology



**DISCOVER** – During this phase, Next-Mark takes a deep, analytical dive into the current project parameters. What is the client's business model? What is/are the specific business process/es being automated with the Salesforce platform? Are there existing Salesforce integrations that need to be incorporated into the implementation? These questions are explored to help chart a clear path forward.



**BUILD** - Informed by the 75+ successful integration builds, Next-Mark applies the most up to date best practices to implement the right integration for the right process. Since no two businesses or business processes are the same, each integration is customized for the idiosyncratic pathways of each organization, ensuring that the desired departments and personnel can maximize the integration and improve efficiency.



**TEST** – Next-Mark runs the build through a series of extended real-life scenarios and analyzes the integration's performance. With carefully crafted KPIs and meticulous documentation, the integration evolves and improves until its performance offers reliable results and its usage feels intuitive to the end user.



**DEPLOY** – At every phase of the methodology, Next-Mark focuses on educating the client to prepare them for taking the integration into their own hands. During the Deploy phase, all of the pieces are put together into a cohesive, quantified system that an organization can use to train new and existing staff. While Next-Mark remains available for further consultation, the emphasis of deployment is to give the clients the tools needed to be self-sufficient managers of their integrations.

### ABOUT NEXT-MARK

Next-Mark, LLC, is a full-service, award-winning marketing communications agency based in Sarasota, Florida. It helps businesses and organizations exceed their growth and financial targets by delivering better competitive insights, more powerful branding, stronger strategies and faster results. As a certified Salesforce partner, Next-Mark bridges the gap between strategic content and full utilization of clients' Salesforce application. From implementation to management of Salesforce, we strive to be a strategic, collaborative partner focused on results.



***"What we really valued the most about Next-Mark and what we'll continue to look for in any partner is someone that can understand what we're asking for, assess where we are at that moment, and collaborate with us on the best way to get there without completely starting over," says Tsai. "Next-Mark was really thoughtful with their approach."***