

Analytics and Reporting Solutions Company

Sales Cloud – Contracts Project

COMPANY OVERVIEW

This organization powers the global institutional investment community by providing performance analytics and reporting solutions fueled by the industry's leading database.

COMPANY PROFILE

LOCATION: Conshohocken, PA
EMPLOYEES: 200
INDUSTRY: IT & Services
SOLUTION(S): Sales Cloud- Contracts
TIMELINE: 6 Weeks

► Challenge

- This IT & Services organization was looking for a repository for tracking all of their contract data with associated products. They were using an extensive Excel Spreadsheet to manually track and manage contracts. There was a lot of room for human error in this manual process and not scalable as they were preparing to launch a new product which would result in an influx of orders and contracts

► Solution

- Implemented the Sales Cloud Contracts Object with custom information
- Implemented the Orders Object to automatically create an Order Record whenever a New Contract Record is created
- Configured the Order Line Items Object to relate Products to a specific Contract
- Delivered a Contracts with Orders and Order Line Items report to illustrate the Contract information as well as the Products associated with the Contract and Order
- Completed a data-migration of all existing Contracts

► Results

- The organization has a comprehensive Contracts repository
- Management has complete visibility into Contract information to manage the Regional Management Team and Financial Forecasting
- The company has a scalable, automated solution they can use to grow with them as the company launches their new product
- This Contracts Project was step 1 to set them up for CPQ Billing (phase 2)

