

Salesforce: Automated Pricing & Quote System



Industry



AI Software Company - Developing Machine-Learning Support Tools for Enterprise-Level Employees

THE PROBLEM

For Moveworks, generating client-facing quotes was time-consuming and involved multiple departments and stakeholders. Salespeople had to request document reviews and updates from the Legal Department and wait anywhere from hours to days for complex quotes and order forms to be reviewed and produced.

All these steps introduced version-control issues and opportunities for human error.

OUR SOLUTION

With Moveworks' custom CPQ implementation, built by StarrData, Salespeople can generate unique and complex sales quotes on their own in real-time for prospects and clients with a few simple clicks.

Standardized processes allow new staff to onboard quickly and easily, with all data living in one centralized location that's easy to track and generate reports from.

IMPROVED RESULTS

Sales staff don't need to slow down and wait for legal review and processing - Prospects can receive and review quotes when sales conversations are still fresh in their minds

- CPQ enforces consistency and variation control in products, quotes, and order forms for all Sales staff
- Contracts, renewal opportunities, and quotes are now all automatically generated, saving time in the sales process and hours of processing by the Legal Dept.
- Conga Composer integration allows for professional looking quote documents that are easily modified over time
- DocuSign API integration allows for e-signatures on any outgoing documents and quotes being sent to prospects and clients
- Checks and balances are now in place with a structured multi-tier approval process to ensure stakeholders are brought in at appropriate times
- Sales opportunity data is now structured for a NetSuite API integration that assists with specific data collection and metrics info calculated on those opportunities



Customer Quote

"Salesforce is a complex product and we couldn't use it off the shelf. It needed to be built out to match our business. StarrData took the time to understand our business model and sales processes. Now, our CPQ implementation gives us better visibility of what salespeople are doing and to see what products and campaigns are working and which ones aren't.

Our Sales reps are building consistent quotes and following the process - things aren't getting missed and everything is being done through the system in a guided way. "



Roman Malanke - Director of GTM Operations at [Moveworks.Ai](https://www.moveworks.ai)



[Click here to tell us about your next project!](#)