

CASE STUDY

**Education Management Leader
Leverages Salesforce Platform to
Streamline Quote and Contract
Configuration Process**

softserve

Client Background

Our educational marketplace client provides professional development services, including assessment and analytics for data-driven instruction and next-generation digital curriculum.

Business Challenge

Our client experienced problems with optimizing and streamlining the sales process:

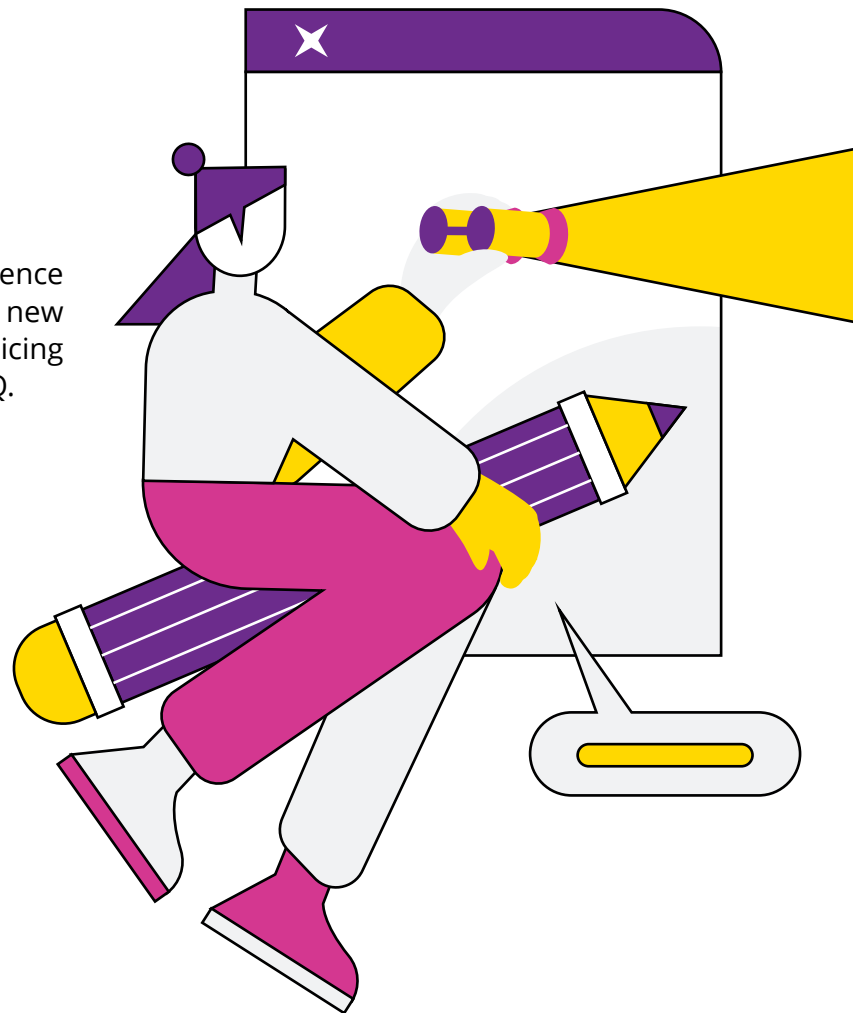
- Time-consuming quoting
- Managing multi-year product delivery
- Tax calculations
- Managing price terms approvals

Project Description

To enable enhanced sales experience SoftServe developed a completely new workflow for quoting, pricing, invoicing and payments based on Salesforce CPQ.

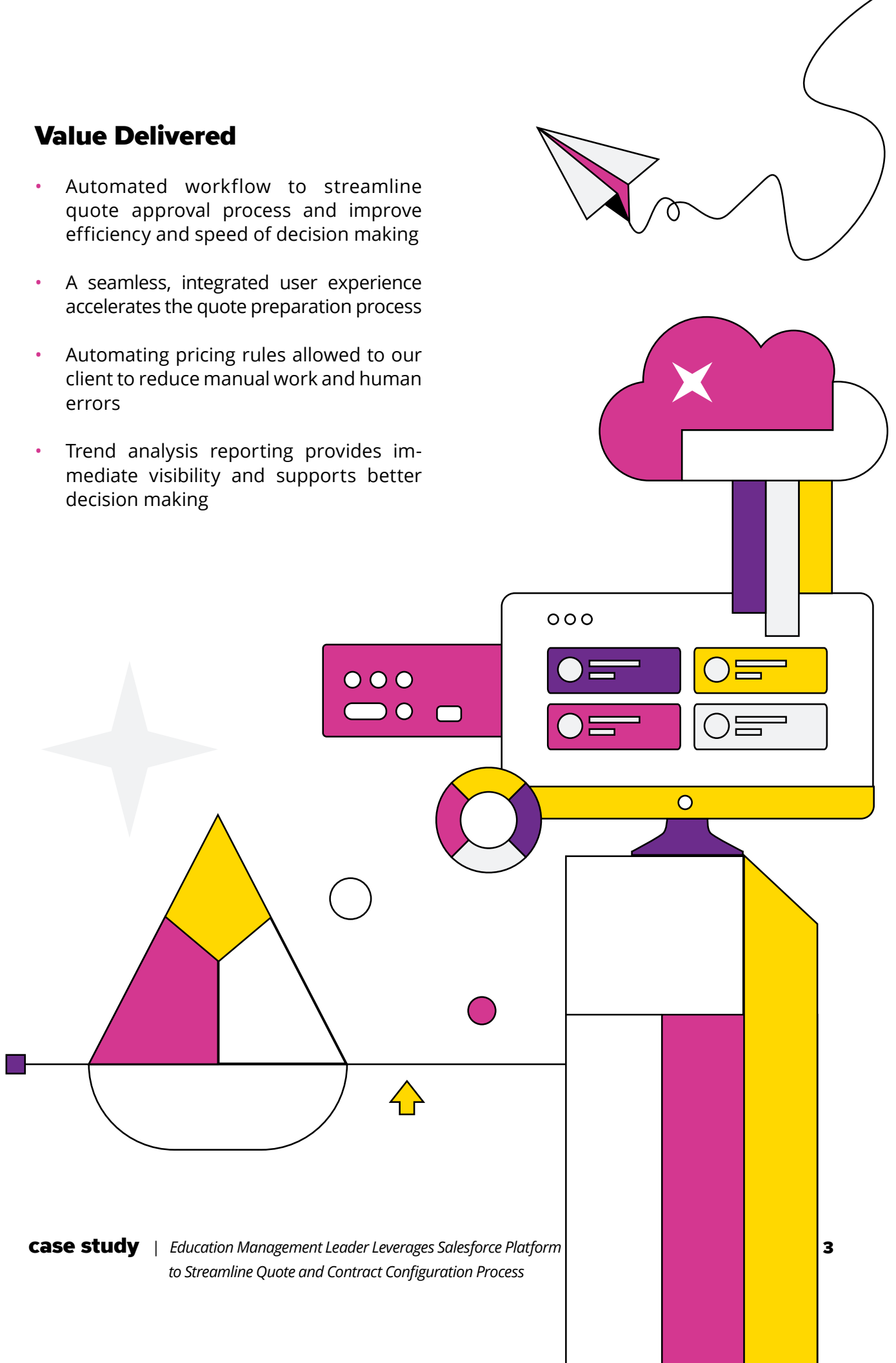
The Salesforce platform:

- Improves user experience during quote creation
- Supports complex configurations that were not possible before
- Enables recurring revenue tracking
- Provides quote templates which increases consistency and familiarity with the user, while reducing errors in creation and processing of quotes



Value Delivered

- Automated workflow to streamline quote approval process and improve efficiency and speed of decision making
- A seamless, integrated user experience accelerates the quote preparation process
- Automating pricing rules allowed to our client to reduce manual work and human errors
- Trend analysis reporting provides immediate visibility and supports better decision making



ABOUT US

SoftServe is a digital authority that advises and provides at the cutting-edge of technology. We reveal, transform, accelerate, and optimize the way enterprises and software companies do business. With expertise across healthcare, retail, energy, financial services, and more, we implement end-to-end solutions to deliver the innovation, quality, and speed that our clients' users expect.

SoftServe delivers open innovation, from generating compelling new ideas, to developing and implementing transformational products and services.

Our work and client experience is built on a foundation of empathetic, human-focused experience design that ensures continuity from concept to release.

We empower enterprises and software companies to (re)identify differentiation, accelerate solution development, and vigorously compete in today's digital economy. No matter where you are in your journey.

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