



# Streamlining Sales Processes for 70% Faster Deal Closure

Transforming quote creation for increased productivity

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## About the Client

Our client, a leading cybersecurity company based in Minnesota, US, is renowned for its best-in-class security monitoring services. Demonstrating a strong commitment to protecting organizations from cyber threats, the company has earned notable acclaim, achieving recognition such as consecutive Forbes Cloud 100 awards and being acknowledged as a leader in managed detection and response.



## Executive Summary

In an effort to overcome challenges in their Lead-to-Cash process, the client partnered with Infoglen to transform their sales operations. By integrating Salesforce CPQ, we automated lead management, optimized routing, and expedited quote creation, resulting in a remarkable 70% reduction in quote creation time and 60% increase in sales revenue. The streamlined processes led to faster deal closures, enhanced sales efficiency, and empowered data-driven growth strategies, ultimately positioning the client for sustained success in a competitive market landscape.

## Business Challenges

The client faced critical roadblocks in their sales and customer success process. Inaccurate lead data hindered conversion, while inefficient lead routing and lack of mechanisms for rerouting and follow-ups risked losing potential customers. Manual quoting with Microsoft Word created delays and administrative burdens, further aggravated by complex pricing structures and product dependencies. Automating this process became crucial to maintain their competitive edge and deliver unparalleled service.

## Our Solution

To tackle these hurdles and strengthen their market position, the client partnered with us for efficient solutions. Our strategy aimed to simplify and optimize the entire quote-to-cash journey by integrating Salesforce CPQ into their sales process. Key components of our solution included:

- **Automated Lead Demand Funnel:** Implemented automation for data checks in the lead demand funnel, ensuring lead information accuracy and reliability. By streamlining lead management processes, sales representatives could focus their efforts on high-potential leads, thereby increasing conversion rates and revenue
- **Intelligent Lead Routing:** Implemented a system to route leads based on factors like geographic location, industry, and lead characteristics. This ensured leads were assigned to the most suitable sales reps, maximizing conversion rates and sales efficiency
- **Revived Dormant Leads:** Developed a mechanism to re-route leads if they remained unclosed within a specified timeframe, preventing leads from being left unattended. This proactive approach maximized the chances of conversion and revenue generation, improving overall sales performance and customer satisfaction
- **Expedited Quote Creation:** Introduced Salesforce CPQ to automate the quote creation process, eliminating manual errors and significantly reducing the time required to generate quotes. This allowed sales representatives to focus more on engaging with clients and closing deals rather than being bogged down by administrative tasks
- **Streamlined Approvals:** Customized Salesforce CPQ to streamline approval workflows, enabling faster and more efficient processing of quotes. By implementing automated approval processes and customized workflows, the client's sales team could speed up deal closures and improve overall sales cycle times
- **Enhanced Reporting:** Integrated advanced reporting capabilities into Salesforce CPQ, providing actionable insights into sales performance and customer preferences. This data-driven approach empowered the client to make informed decisions, optimize sales strategies, and identify new growth opportunities



## Business Outcomes

The dynamic collaboration between the client and Infoglen resulted in substantial benefits, setting the stage for an inspiring success story.

- **Faster Deal Closures:** The implementation of Salesforce CPQ led to a remarkable **70% reduction in quote creation time**, enabling the client to respond to client inquiries swiftly and close deals faster. This accelerated sales cycle resulted in increased revenue and improved customer satisfaction
- **Improved Sales Efficiency:** Our solution helped achieve **60% growth in revenue**, by automating manual processes and streamlining approvals. Sales representatives could now focus on building relationships with clients and delivering personalized solutions, leading to higher conversion rates and greater sales success
- **Data-Driven Growth Strategies:** With enhanced reporting and analytics capabilities, the client gained valuable insights into sales performance and market trends. This enabled them to develop targeted sales strategies, identify emerging opportunities, and drive sustainable business growth in a competitive market landscape

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