

# FROM GOOGLE SHEETS TO SALESFORCE CPQ

Our financial forecasting client's business was outgrowing Google Sheets and needed a solution that could keep up with its complex pricing model. CPQ turned out to be the right match, as it was able to align with that pricing model to deliver greater efficiency and accuracy in calculating quotes.

## THE IMPACT



**Less revenue leakage due to a more robust approval system**



**Greater sales productivity due to an easier quoting and proposal process**



"SMI was a tremendous help towards us automating a massive pain point in our Sales cycle. SMI's assistance made implementing CPQ simple and efficient – we were able to get running with the tool in a shorter time than expected."

- Brandon Azuoma, IT Project Manager at Govinvest



**GovInvest**  
The Financial Forecasting Authority

GovInvest provides software services for labor costing, pension, and OPEB analysis. Its financial forecasting technology and subject matter experts help governments plan more confidently in the long term.

<http://govinvest.com>

## THE CHALLENGE

GovInvest was generating quotes manually in Microsoft Excel sheets with a complex pricing model, which made the quote-to-cash process very time consuming and inefficient. This included the generation of proposals in multiple, non-standardized formats.

There was no ability to automatically generate reports, since most of its valuable data lived outside Salesforce.

## BUILDING OUR SOLUTION

We decided to implement Salesforce CPQ, which was able to configure products, pricing, and quotes that matched GovInvest's complex pricing model.

We then implemented Conga Sign and Conga Composer to standardize the quote and proposal generation process for GovInvest.

## OUTCOME

A more streamlined, less manual quoting and proposal generation process in CPQ led to greater sales productivity. They now have an easier ability to add products, pricing, bundles, etc. in the present and are more prepared for their business and pricing to evolve in the future.

GovInvest went on to experience less revenue leakage due to a more systematic approval and discounting process as well as more accurate reporting due to a substantial increase in data integrity in their Salesforce ecosystem.