Premier or Signature Accelerator: 11 hours

GOAL
Gain Business Insight

INTENDED USER
Sales leaders looking to improve business process from lead to cash, including leads, opportunities, forecasting, CPQ & orders.

PREREQUISITES
• Must have Premier or Signature Success Plan.
• Sales Cloud Licenses
• A leader or executive who is engaged and committed to a successful outcome
• Participation by a sales leader familiar with your business processes
• Willingness to complete a customer satisfaction survey at the conclusion of the Accelerator

To schedule your 1-on-1 Accelerator, visit our Help Portal, or contact your account executive or success team today!

Improve your understanding of the lead to cash business process across your organization.

Start aligning your business processes from lead to cash so you can improve your lead conversion and opportunity close rate. In this Accelerator, our Specialist will review how your organization uses lead management, opportunity management, forecasting, CPQ and order management. We will then provide you with a set of tailored recommendations on aligning these processes to improve productivity and profitability. You’ll also learn best practices for keeping your processes aligned moving forward.

What it can do for you

• Gain an understanding of the Lead to Cash Business Process across your organization
• Improve your lead conversion and opportunity close rate as a result of alignment
• Build Reports and Dashboards
• Better collaboration and engagement among employees

How it works

A Certified Specialist will guide you through the process via four-five calls totaling 11 hours over 3 weeks.

Discovery

A Specialist will review the scope of the Accelerator, identify your business goals, and establish success criteria for the Accelerator.

• During a discovery call, we will review your current lead to cash process, review with you a series of discovery questions and identify any additional discovery questions specific to your business.
• Discovery will focus on Lead Management, Opportunity Management, Forecasting, and CPQ & Order Management.

Assessment

• Our Specialist produce Executive Assessment of Lead to Cash based on a discovery call.
• The Specialist will walk through the report with you, outlining our discoveries and sharing specific recommendations for your business. The Specialist will also provide Best Practices for taking action on our recommendations.
HOW TO: SALES CLOUD:
Lead to Cash Process

Outcomes

• Understand your Lead to Cash Business Process from Executive Standpoint.
• Lead to Cash Best Practices to simplify business and improve productivity and efficiency
• High-Level recommendations for training, documentation, and process improvements - including actionable, measurable steps

ADDITIONAL INFORMATION

Premier or Signature
Time you will spend on this Accelerator: 11 hours

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