CASE STUDY · ENTERPRISE TRANSFORMATION

Modernizing Quote-to-Cash at a $2B SaaS Company

How SaaS Business Advisors partnered with a $2B SaaS company to deliver Salesforce CPQ, RightRev Billing, and automated revenue recognition — on time, under budget, and with a projected 5-year ROI of 220%.

Why SaaS Business Advisors

When the CIO needed an executive program lead for one of the most complex transformations in the company's history, they didn't want a firm that would send a team of analysts and a playbook. They needed someone who had been there before — someone who could step into a complicated, high-stakes environment and immediately bring structure, calm, and momentum.

> *"We brought in SaaS Business Advisors because they can quickly diagnose problems and take decisive action. Their range of experience makes them effective in any environment — and they have a unique ability to bring calm to even the most chaotic situations."*
> — CIO, SaaS Company

With 30 years of experience leading large-scale, multi-dimensional transformations, SaaS Business Advisors brings something most firms can't replicate: the ability to operate fluently across every level of an organization. From boardroom strategy to technical architecture, from executive stakeholder management to front-line change adoption — the team speaks every language. That capacity for translating complex ideas across roles and levels is what keeps programs aligned when the pressure is on.

EXPERIENCE AT SCALE	CROSS-FUNCTIONAL FLUENCY
30 years leading complex, multi-dimensional transformations across business, IT, and operations.	Proven ability to partner across every team and level — from the CIO to the coder.
STRUCTURED METHODOLOGY	**TRUSTED ADVISOR MODEL**
A proven six-stage framework that gives clients clarity from day one and drives execution at pace.	A confidant who will tell the truth, hold people accountable, and stay focused on outcomes.

This engagement was the first of four projects SaaS Business Advisors led for this client — a relationship built on trust, candor, and a consistent track record of delivery.

4× SaaS Business Advisors has led four separate engagements with this client, each building on the foundation of the last.

The Situation

Growth has a way of exposing the seams in any system. For this company, those seams were showing everywhere. The existing Configure, Price, Quote (CPQ) platform had been built for a simpler era — before the product catalog ballooned in complexity, before partner and channel sales multiplied, and before multi-year deals and renewal automation became business-critical capabilities.

The symptoms were impossible to ignore:

- Sales reps had built their own shadow systems — spreadsheets, manual trackers, offline validation — just to get a quote out the door.
- Billing was generating late and inaccurate invoices.
- Renewal and amendment processes were entirely manual.
- Revenue recognition lacked the automation needed to meet reporting demands.
- With direct sales, partner channels, and FedRAMP requirements all in play, the absence of a unified process was creating risk across the entire revenue cycle.

The company made the decision to transform — not patch. The vision was a unified Quote-to-Cash engine built on Salesforce CPQ, automated billing through RightRev, and a fully integrated revenue recognition platform that could scale with the business.

The Business Case

The investment was grounded in a rigorous business case tied to four primary growth enablers: renewals, new logo acquisition, value selling, and channel and partner expansion. The financial case was compelling.

$6.5M	220%	$9.7M	16 mo
Fully realized annual benefit	5-year ROI	Net present value	Payback period post go-live

The program called for a $3–3.5M implementation investment covering CPQ, Billing, automated revenue recognition, and MuleSoft integration, alongside $850K in annual recurring costs ($350K software, $500K headcount). Value was tracked across four measurement domains: sales performance, efficiency and productivity, customer experience, and pricing and margin optimization.

Program Goals

Implement Salesforce CPQ and RightRev Billing to automate renewals and amendments across multi-year deals.	Rationalize SKUs, bundles, and product hierarchy; align sales to standard offerings with CPQ Advanced Approvals to manage exceptions.
Revamp Closed-Won and Order Management with CRM as the system of record for customers and entitlements.	Standardize customer and partner processes; rationalize account hierarchy for direct and channel selling.
Automate revenue recognition through the RightRev module integrated with CPQ and Billing.	Perform data cleanup to standardize assets, subscriptions, and contracts — enabling multi-year and ARR reporting.

The Challenge

Transformation programs of this complexity don't fail because the technology is wrong. They fail because no one is truly holding the whole thing together. This program spanned five cross-functional teams, six interconnected systems, and three external consulting partners — all with their own timelines, priorities, and definitions of done.

SaaS Business Advisors stepped in as executive program lead and direct partner to the CIO — accountable for the outcome, not just the plan. That meant structuring the program from day one, managing team dependencies, surfacing risk before it became crisis, and ensuring every workstream moved in the same direction.

> *"When you have this many moving parts, the biggest risk isn't technical — it's alignment. You have to constantly reinforce why this matters and make it easy for people to surface problems before they become crises."*
> — VP, Business Technology

Three challenges defined the program:

- Scope pressure: With multiple transformation initiatives running simultaneously, sustaining engagement from key stakeholders required a disciplined communication strategy and consistent executive reinforcement.
- Test complexity: The depth of the integration work — CPQ, Billing, RightRev, and MuleSoft running together — meant test cycles ran long, with multiple rounds required before the system met production standards.
- Data migration failure: A mid-program failure produced incorrect outputs that put the entire timeline at risk.

The response was immediate. A cross-functional SWAT team was assembled — pulling together the data team and key technical leads — to do a structured diagnostic, mapping the data sets and identifying the missing connective elements between the data model and the sales process. The migration was rebuilt with the integrity the program required, and the timeline held.

The Approach

The program was structured through SaaS Business Advisors' six-stage methodology — giving every stakeholder a clear line of sight from start to finish. Transparency was the operating model. The leadership team met consistently throughout, with daily updates to the CIO to surface risks early and keep the organization aligned. That level of structured, proactive communication is what separates programs that land from programs that stall.

Change management and training were built into the program from the outset — not treated as a go-live afterthought. A structured change strategy ensured that sales reps, operations teams, and partner-facing staff understood the new workflows before they were live, reducing friction at launch and accelerating adoption. Training was tailored by role and delivered in advance of cutover, with reinforcement mechanisms in place to support the transition.

Technology delivered within scope:

- Salesforce CPQ with advanced approvals and bundle configuration
- RightRev for automated billing and revenue recognition
- Conga Composer for proposal generation
- MuleSoft for system integration
- Automated order creation at deal closure
- FedRAMP requirements and full partner/channel selling capability

The Outcome

The program was delivered on time and under budget. Across all four measurement domains, performance moved in the right direction from day one.

Sales Performance	Efficiency & Productivity	Customer Experience
• 30% reduction in quote-to-close time • Faster sales cycles on complex deals • Improved average deal size visibility	• 10% improvement in deal desk approvals • Higher quote accuracy across the board • Reps operating fully within the system	• Faster, cleaner proposals to customers • Renewal & amendment automation live • Billing disputes resolved 75% faster

Teams that had been operating in silos were now working from the same data, the same process, and the same system of record. For the first time, leadership had unified reporting across the revenue cycle — with ARR, entitlements, and multi-year contract data all accessible in one place to support real-time decisions.

The Takeaway

Large-scale transformation programs don't succeed on technology alone. They succeed when an experienced, trusted partner is accountable for the whole — someone who can walk into complexity, assess it quickly, and activate a plan that the entire organization can follow.

With a 220% five-year ROI and a 16-month payback period, this program didn't just modernize a system. It positioned the business to grow — and began a partnership that has continued across four engagements and counting.

Salesforce CPQ · RightRev Billing · Revenue Recognition · MuleSoft · Quote-to-Cash · Change Management · Cross-functional Leadership · SaaS