CASE STUDY — PROGRAM DISCOVERY & DESIGN

Setting Up a QTC Transformation for Success

How SaaS Business Advisors served as program lead for a 9-week Quote-to-Cash discovery — coordinating 13+ stakeholder groups, producing a fully scoped and signed-off program design, and giving the CIO and executive team everything they needed to make a confident funding decision.

THE CONTEXT

Not every engagement ends with a go-live. Some of the most valuable work SaaS Business Advisors does happens before a single line of code is written — in the discovery and design phase, where the difference between a program that succeeds and one that stalls is almost always decided.

This is one of those stories. A SaaS software company needed to modernize its Quote-to-Cash capabilities to support the growth of its cloud product line. The systems in place had been built for a simpler time. As the business scaled, the gaps were multiplying: sales teams were quoting outside the system, billing was largely manual, revenue recognition lacked automation, and the integrations connecting the core platforms were patched together rather than purpose-built.

The CIO and executive team knew a transformation was needed. What they didn't yet have was a structured, defensible program design they could take to the ELT and board with confidence. That's where SaaS Business Advisors came in.

THE ROLE

SaaS Business Advisors served as program lead for the discovery and design phase — not as a technology implementer, but as the orchestrator of the entire effort. That meant coordinating two systems integrator partners, managing 13+ stakeholder groups across the business, structuring the discovery process, and synthesizing everything into a clear, actionable program design that the organization could align behind.

The role required operating at every level simultaneously: advising the CIO on program strategy, facilitating detailed workshops with sales, finance, deal desk, and service teams, and ensuring that the technical architecture and the business requirements stayed connected throughout. That capacity to bridge the executive and operational layers — and hold the whole picture together — is what SaaS Business Advisors was uniquely positioned to provide.

> *"The biggest risk in a transformation of this complexity isn't the technology — it's starting to build before you truly understand what you're building. Discovery done right is the most important investment a program can make."*

THE WORK

Over nine weeks, the team conducted a comprehensive discovery across every dimension of the QTC process — people, systems, and operations. The depth and breadth of what was produced in that window reflects the structured approach SaaS Business Advisors brought to leading the effort.

32	180+	22	13
Workshops conducted across all workstreams	User stories captured and prioritized	Stakeholders engaged across 13+ groups	System integrations mapped and designed

The discovery covered five core workstreams — CPQ, Billing, Service Cloud, Integrations, and Reporting and Revenue Recognition — and produced a full future-state architecture built on Salesforce as the central hub, with a financial system for invoicing, a payment platform, an integration layer, and a contract lifecycle management solution.

PROGRAM GOALS DEFINED

Realize cloud product potential by enabling quoting, billing, and provisioning in a unified system	Improve GTM efficiency by empowering sales to quote and close independently in Salesforce
Accelerate customer success through a 360° account view and automated digital customer journeys	Fuel the partner ecosystem by enabling partner discounting, credits, and channel sales workflows

THE MVP PRIORITIZATION FRAMEWORK

One of SaaS Business Advisors' core contributions was designing and facilitating a five-step MVP prioritization process — a structured methodology for moving from 180+ requirements to a sequenced, fundable program design. The framework ensured that prioritization decisions were grounded in business value, not just technical complexity or stakeholder loudness.

1	2	3	4	5
Define vision & outcomes	Evaluate process flows by business impact	Align business value & complexity by capability	Assess capacity & budget constraints	Outline MVP roadmap & future phases

This framework produced a phased program design with clear MVP scope, a defined backlog of future enhancements, and a cost and timeline model the executive team could evaluate against the business case. The result was a program ready to execute — not a wish list waiting to be scoped.

WHAT WAS DELIVERED

Program design

- Full future-state process flows
- 22 capability epics scoped
- 180+ user stories prioritized
- Phased implementation roadmap

Technical architecture

- Future-state system landscape
- 13 integrations mapped
- Data model and security design
- Environment and release strategy

Organizational readiness

- Change impact assessment
- Stakeholder engagement strategy
- Training and communications plan
- ELT sign-off achieved

WHAT THE DISCOVERY REVEALED

Beyond the technical design, the discovery surfaced critical organizational dynamics that would have threatened the program if left unaddressed. Stakeholders described a sense of change fatigue — the program was launching alongside significant organizational changes, and end users had historically not been involved early enough to feel ownership over the outcomes. Leaders weren't consistently reinforcing expected behaviors, and enablement materials weren't tailored to how different teams actually worked.

These findings were documented and built directly into the change management strategy — ensuring that when the program moved into build, it wasn't carrying hidden organizational risk. That level of candor and organizational insight is only possible when the program lead has deep experience running cross-functional transformations and knows what to look for.

The insight that matters

The discovery identified that the program would need to move quickly while managing change fatigue — a tension that required explicit design choices about pacing, stakeholder engagement, and how to demonstrate early wins without disrupting existing workflows. Those design choices were embedded in the program plan before a single development sprint began.

THE OUTCOME

The discovery phase delivered exactly what it was designed to deliver: a fully scoped, architecturally sound, stakeholder-aligned program design ready for funding approval. Twelve senior stakeholders — including the CRO, CPO, VP of Revenue Operations, and multiple department directors — signed off on the discovery deliverables. The ELT had a complete picture of scope, cost, timeline, and risk.

The full program was not funded at that time — a business decision driven by company priorities, not a reflection of program readiness. The design, the backlog, the architecture, and the change strategy remain fully intact. When the organization is ready to move, the program is ready to execute.

That is the value of discovery done right. No wasted build cycles. No mid-program pivots. No surprises for the board. Just a clear, defensible path forward — designed by people who have run programs like this before.

THE TAKEAWAY

The most expensive mistake in a large-scale transformation isn't a failed implementation — it's starting to build before you know what you're building. SaaS Business Advisors brings the experience to structure discovery as a strategic investment: one that produces clarity, alignment, and a program design rigorous enough to survive the pressure of execution. Whether the program launches tomorrow or next year, the foundation is there. That's what good program leadership looks like.

Quote-to-Cash · **Salesforce CPQ** · **Program Discovery** · **MVP Prioritization** · **Change Management** · **Executive Alignment** · **Integration Architecture** · **SaaS**