



CREATING A FRICTIONLESS CUSTOMER & SALES EXPERIENCE

EBOOK

A case study presented by the
VP of Enablement and Rates at
a general services company.

 zilliant DEAL MANAGER

 zilliant SALES IQ

 zilliant PRICE IQ

 zilliant PRICE MANAGER



PAINFUL SALES PROCESS



MANUAL DATA INPUT



LIMITED FLEXIBILITY



EXCESSIVE QUOTE
TURNAROUND TIME



LACKED DATA SCIENCE
AND AUTOMATION



EMBARKING ON A TRANSFORMATIONAL JOURNEY

As its sheer scale and business complexity outpaced its pricing capabilities, a general services company was seeking new ways to innovate while keeping its people and customers the top priority. The company embarked on a multi-year journey to digitize the customer pricing and sales rep experience. The primary three goals of this journey were:

- **Evolve from Legacy Systems:** For years, the company had been bolting onto its in-house legacy pricing system. Over time, enhancing and adapting to competitive marketplace dynamics grew more costly and time-consuming.
- **Automate Cumbersome Manual Processes:** Manual processes were frustrating to the sales team because internal communication with the pricing team was taking far too long, even for simple requests.
- **Get the Most Out of Data:** The company generated plentiful data but needed help integrating that data into core pricing processes so sales could get prices back quickly without manual touchpoints.

PAINFUL SALES PROCESS & CUSTOMER EXPERIENCE

Inefficient quoting and contracting processes were difficult for both customers and sales reps.

- Sales reps had to provide sample data and other details manually.
- Sales reps had limited pricing flexibility.
- Quote turnaround stretched into days, which introduced rate errors and harmed the customer experience.
- Sales reps had to perform cumbersome analysis to project a customer's future volume and spend.

The company's executive leadership team quickly realized that customers and sales teams needed simplicity, speed, and transparency when it came to pricing. However, digitizing the company's entire pricing process promised to be a massive undertaking.

To get this project off the ground, the company's VP of Revenue Enablement and Rates presented a business case to the executive leadership team that illustrated how this pricing transformation would enable the company to win **bigger, faster, and more profitably**. The executive team agreed that data science needed to be injected into the company's inefficient pricing processes to automate sales motions and pricing analysis efforts.

SELECTING ZILLIANT: LEVERAGING PROVEN, REPEATABLE SOLUTIONS

The company at first discussed building its own in-house pricing science solution, but its past experience stitching together legacy systems proved troublesome and costly. Therefore, the decision was made to research the market for a provider that could handle the scope and complexity of its pricing transformation.

After a highly competitive RFP process, the company chose to partner with Zilliant. The fact that Zilliant sought to deeply understand the company's business challenges and deliver the right solutions was key in the selection process.

THE END-TO-END SOLUTION

On the front end of the company's transformational solution was Zilliant's deal management application, **Deal Manager™**, which simplifies customer price agreement management and enables sales reps to more effectively manage discounts.

Deal Manager™ integrated with the company's CRM, and sales reps could obtain an initial offer with discount guidance based on customer profiles and preferences with a few clicks.

- Deal scoring gave sales reps flexibility to adjust discounts on the spot and discounts within a certain range could be auto-approved.
- If discounting was outside guardrails, an approval workflow enabled the pricing team to review exception deals.
- Deal terms were issued to customers via DocuSign integration.

This Deal Manager™-fronted approach was a true end-to-end solution; the sales team no longer had to pivot between three or four different systems.



BEST-IN-CLASS PRICING SCIENCE

ADVANCED ANALYTICS

HIGHLY FLEXIBLE SOFTWARE PLATFORM

ELIMINATE MANUAL PROCESSES

ABILITY TO HANDLE MASSIVE DATA SETS

zilliant DEAL MANAGER



**CRM
INTEGRATION**



**DEAL
SCORING**



**EXCEPTION
DEALS REVIEW**



**DOCUSIGN
INTEGRATION**

THE RIGHT PRICES, THE RIGHT WAY

But Deal Manager™ was just the start. Because it easily integrates with Zilliant's robust ecosystem of pricing and revenue operations and intelligence software, Deal Manager™ surfaced the data science-driven insights sales reps need, right at their fingertips.

- **Sales IQ™** utilized company transactional data to better understand customer buying patterns and created similar customer profiles automatically without manual sales input.
- **Price IQ®** unlocked pricing flexibility by enabling specific pricing guidance based on customer segmentations and customer profiles.
- **Price Manager™** made it easy to adjust pricing guidance and define where approvals are needed, as the strategy dictates.

By enabling the sales team with easily adjustable discounting and deal scoring, deals remained in a healthy, profitable range, and sales reps were incented to build a better deal the first time to avoid internal approval processes.



CHANGE MANAGEMENT: THE LAST MILE OF DIGITAL TRANSFORMATION

Even with Deal Manager™ deployed, it took time for the company's 2,000+ sales users, dozens of pricing users, and the core enablement team to get on board with the new processes.

Stakeholder alignment and communication were key to changing ingrained behaviors. The value of pricing science, deal scoring, and analytics were all new concepts to many sales reps. Knowledge-sharing training sessions went well beyond the typical two-day onboarding; additional support meetings and sessions were often extended for months.

In the six months since this change management effort was initiated, Deal Manager™ adoption grew from 40% to 90%. Now, the majority of deals negotiated by the company's sales team in the United States are going through Deal Manager™ and powered by Zilliant science.

CHANGE MANAGEMENT LESSONS LEARNED

- ➡ ADOPTION CANNOT BE FORCED
- ➡ IT TAKES TIME TO TRUST A NEW SYSTEM
- ➡ COMMUNICATING THE VALUE OF A SIMPLIFIED PROCESS IS KEY
- ➡ FOCUS ENERGY ON SHIFTING FROM COMPLEX TO SIMPLE SALES AND PRICING PROCESSES
- ➡ DEAL-LEVEL DEAL SCORING INCENTIVIZES THE RIGHT BEHAVIOR

TODAY'S FRICTIONLESS CUSTOMER AND SALES EXPERIENCE

With a completely revamped pricing process, quoting is streamlined. The sales team can spend more time selling and less time on internal price negotiation.

The key results of this transformational, Zilliant-powered pricing journey include:

- Higher win rates on new deals
- Improved deal profitability
- Faster quoting as fewer deals are funneled through the pricing team
- More efficient collaboration with the pricing team

By partnering with Zilliant to use Deal Manager™ and pricing and revenue optimization solutions, this general services company is now able to accommodate more complex deals in the U.S. market and is looking to expand globally in the coming years.

Contact us today to learn more about how Zilliant can guide your pricing transformation to enable more efficient processes and increase profitability.

“Being able to handle our amount of transactional data and being best-in-class in pricing science is why Zilliant rose to the top for us.”

– VP of Revenue Enablement and Rates, General Services Company



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