**Project Title:**   
Revenue Operations Platform: Automated Quote Generation, Approval Governance, and Billing Synchronization

**Industry:**B2B SaaS / Managed Services / Manufacturing & Distribution

**Project Type:** Salesforce CPQ & Billing

**Target Users:**

* Sales Representatives & Account Executives
* Sales Operations & Revenue Analysts
* Finance & Billing Teams
* Legal & Compliance Officers

**Problem Statement**

For small and medium enterprises, the manual quote-to-cash process is a major source of operational inefficiency and financial risk. Sales teams struggle with inconsistent pricing, non-compliant contracts, and a lack of version control, which leads to quote inaccuracies and protracted approval cycles. This fragmented process creates a significant disconnect between sales and finance, resulting in delayed invoicing, revenue leakage, and a poor customer experience.

The company requires a Salesforce-based Revenue Operations platform to:

1. **Accelerate Quote Generation** – Automate accurate quotes with dynamic pricing, product bundling, and rule-based configurations directly from the opportunity record.
2. **Enforce Discount Governance** – Implement approval chains based on thresholds, margins, and product types to maintain compliance.
3. **Streamline Contract & Order Management** – Transition seamlessly from approved quote → order → contract → billing.
4. **Provide Strategic Insights** – Dashboards for pipeline, deal velocity, discount trends, invoice status.
5. **Enhance Integration** – Sync with ERP/billing systems for automated invoicing and payment processing.

**Requirement Gathering**

* Quotes should be auto-generated from Opportunities.
* Multi-level approvals for discounts > 30%.
* Integration readiness with external billing/ERP.
* Role-based access (Sales, Finance, Legal).
* Real-time dashboards for leadership.

**Stakeholder Analysis**

* **Sales Reps** → Need faster quote creation.
* **Sales Ops** → Need governance on discounts and approvals.
* **Finance** → Need accurate invoices, prevent revenue leakage.
* **Legal** → Ensure contracts comply with company policies.
* **Leadership** → Want visibility into revenue pipeline.

**Business Process Mapping**

**Lead → Opportunity → Quote → Approval → Order → Contract → Invoice**

**Industry Use Case Examples**

* SaaS company automating subscription renewals and upsells.
* Manufacturing firm selling bundled products with tiered pricing.
* Managed services provider offering multi-year contracts with approval workflows.