



How a public safety SaaS company unified quoting and contracts with Salesforce Revenue Cloud Advanced

Executive snapshot

A fast-growing public safety SaaS company relied on multiple systems for quoting and contracts. Teams used a mix of CLM, legacy CPQ, spreadsheets, and manual workflows. This created data silos, pricing errors, compliance risk, and slow sales cycles.

RevSolutions built a new Salesforce Revenue Cloud Advanced setup that unified CPQ and contract management in one place. The team also migrated all legacy CPQ data without loss.

The company now runs quoting and contracts from a single system with faster turnaround, accurate pricing, and strong process control.

About the client

The client operates in the public safety technology space. They offer a SaaS platform used by emergency response systems and partner networks.

Their sales model includes:

- B2B and public sector deals
- annual and multi-year subscriptions
- usage-based pricing
- partner and channel deals

Deals often include large quote sizes, multiple approvals, and strict compliance requirements.

The challenge

The client managed quoting and contracts across multiple disconnected systems.

- quoting in legacy CPQ
- contracts in a separate CLM tool
- no single source of truth
- heavy manual pricing leading to errors and discount leakage



- ramped subscriptions required manual setup
- poor visibility into pipeline and revenue
- need to preserve historical CPQ data for compliance

Rapid growth and upcoming business milestones increased pressure to fix these gaps.

Why RevSolutions joined the project

The client needed a team that could handle a full green-field implementation and complex pricing logic under a strict timeline.

RevSolutions brought:

- experience with Revenue Cloud Advanced implementations
- expertise in ramped pricing and custom pricing logic
- ability to deliver within a 13-week timeline
- strong alignment with leadership and project stakeholders

The solution and implementation

RevSolutions implemented Salesforce Revenue Cloud Advanced with a full rebuild of quoting and contract processes.

Core work delivered:

- full product catalog setup with 100+ products and pricing structures
- custom ramp pricing logic using Apex and API-based approach
- custom Target Customer Amount at quote group level
- guided selling and simplified quote layout
- automated quote creation from Opportunity
- full migration of legacy CPQ quotes, lines, and discount data

Key improvements:

- automated ramping instead of manual line setup
- structured quote summary for contract integration
- improved pricing accuracy and consistency

Timeline:

- completed in 13 weeks
- structured delivery across discovery, build, testing, and go-live

Challenges handled:

- replaced platform limitations with custom ramp logic
- managed complex data migration through multiple test cycles
- aligned stakeholders through structured workshops
- delivered within a tight timeline using parallel workstreams



Results and impact

The client improved speed, accuracy, and control across quoting and contracts.

- quote creation reduced from hours or days to under 15 minutes
- quote to contract cycle improved by over 60 percent
- ramp setup automated by around 90 percent
- pricing errors and discount leakage eliminated
- Excel dependency reduced to zero
- over 90 percent user adoption in the first month
- real-time pipeline visibility improved
- full audit trail and compliance control established

Highlights and next steps

This project stands out because it replaced multiple disconnected systems with a single Revenue Cloud setup while preserving all historical data and meeting a strict timeline.

Next steps include:

- billing implementation
- usage-based invoicing
- AI-driven pricing recommendations
- global rollout of the platform