

# CASE STUDY

## Quote to Cash Implementation



**ATG's deep understanding of Quote to Cash leads to simplified solutions and support for progressive growth.**

**INDUSTRY**  
Data Governance Software  
**SERVICES**  
Support  
Professional Services  
Customer Success



### Summary of Business Challenges:

- Due to multiple acquisitions over time, the client's systems and processes became complex, making their business complex and not supportive of aggressive growth goals.
- Utilizing three different quoting solutions was creating inconsistencies, causing issues in data integrity and efficiency within the quoting process.
- Multiple variations in systems, business processes and products, were interfering with the Sales Team's ability to access the correct information and deliver consistent, accurate quotes.
- The client needed one consistent tool to manage all solutions and processes to meet business goals.



### ATG Solutions & Tools:

#### Advisory Services

- Engaged in company wide conversations and immediately identified opportunities for improvement.
- Provided a future state recommendation that would help alleviate pains through a single platform solution.
- Consolidated options and aligned tools which gave the client a clear path in deciding their next steps.
- The client is now able to leverage a quoting solution that delivers a streamlined end to end process by introducing guard rails and control over a standard set of business rules, which supports overall growth.

*“We selected ATG because, frankly, this is what they do. They have a deep understanding of the Quote to Cash space and have worked with many customers - to get an understanding of who they are, what they need, and how to move forward.”*

#### ATG Client

Data Governance Software  
Company



### Results & Impact:

- Identified a business solution aligned with the goal of utilizing a single platform that supports an emerging subscription-based selling model and adapts to the changing industry.
- Assisted with the development of a roadmap to provide clear direction for implementing a recommended solution that could be enhanced with ATG's Atlas Framework methodology and tools.
- Recommended a pilot program followed by subsequent phases that move existing services onto the established platform with the following benefits:
  - Limits risk of initial deployment and provides a chance to resolve issues while impact is small.
  - Provides real user feedback on adoption issues and allows these to be addressed before major rollout.
- Provided the client with the tools, evidence, and assurance needed to make an educated decision on an integrated CPQ and Billing solution.