MERGE

From RevOps Review of Every Quote to Complete Sales Self-Service: Merge's CPQ Transformation with Subskribe

Discover how Merge eliminated manual reviews, achieved sales self-service quoting, and transformed RevOps from quote builders to strategic advisors.

COMPANY

Merge

INDUSTRY

API Integration Software

GOALS

- Enable true sales rep self-service for quoting

- Eliminate manual quote review by RevOps team

- Remove scaling bottleneck as company grew

- Reduce calculation and data entry errors

- Streamline approvals with proper audit trails

- Maintain strong Salesforce integration

RESULTS

- Achieved complete self-service with minimal training

- Freed RevOps team to focus on strategic initiatives

- Dramatically decreased quote creation time

- Slashed down calculation and data entry errors

- Implemented proper approval workflows and documentation

- Maintained SFDC data sync with a standalone interface

Customer Overview

Merge, a fast-growing technology company, faced a critical scaling challenge: their RevOps team had to review nearly every quote generated by the sales team. Eric Myll, VP of Revenue Operations and Customer Success, leads a team of nearly 30 people across revenue operations, pre-sales, implementations, customer success management, and technical support.
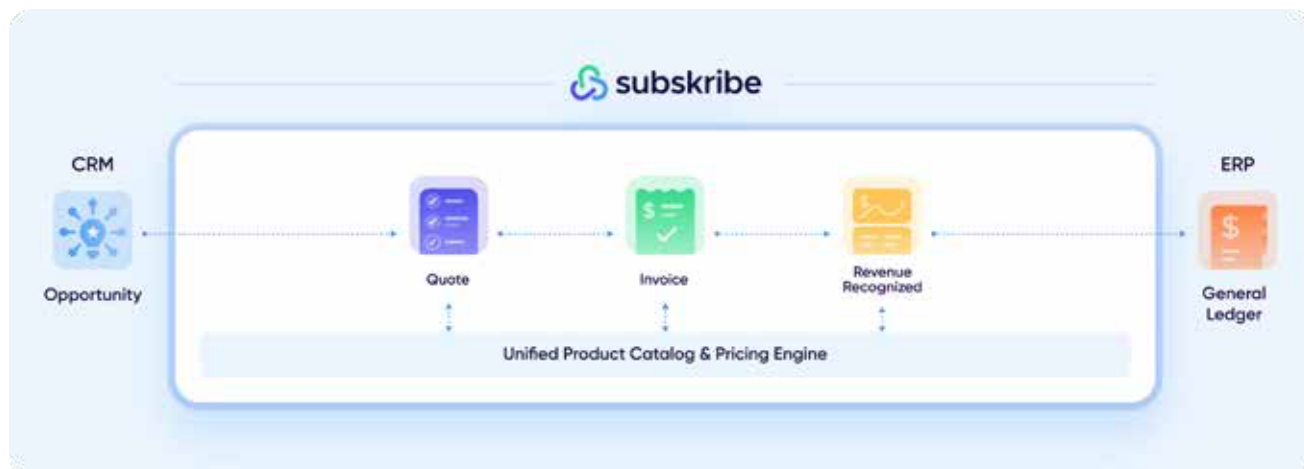
The Breaking Point

Prior to Subskribe, Merge's quoting process was breaking under the strain of growth. The company faced a situation where 100% manual review was required for quotes. As Eric Myll explained, "We have to be in the flow... not only are we helping build or checking them, but how do you document approvals?" This constant involvement from the RevOps team created a significant burden on resources.

The Google Sheets-based system they were using led to frequent calculation and data entry errors, particularly when handling more complex scenarios like amendments and renewals. These errors often cascaded into poor customer experiences, as contracts frequently needed to be re-executed, creating unnecessary friction in the sales process.

Without a formal system in place, approval workflows were managed through ad hoc Slack channels, which lacked proper documentation and audit trails. Perhaps most concerning was that as the company continued to grow, having the RevOps team personally review every quote became increasingly unsustainable, creating a clear bottleneck that threatened to limit Merge's scaling potential.Retry-Claude can make mistakes. Please double-check responses.

The Search: Finding a Modern Solution for Modern Problems

When evaluating potential solutions, Merge had three primary criteria that guided their search. They needed a solution with exceptional ease of use that would enable true sales rep self-service, eliminating the constant need for RevOps involvement.

The system also needed to handle complex scenarios like mid-term amendments and contract restructuring effectively, addressing one of their most persistent pain points.

Initially, Merge considered a Salesforce-based UI crucial, but this requirement reversed during the evaluation process as they discovered what would truly work best for their sales team's workflow.

The Salesforce Integration Revelation

One of the most surprising discoveries during Merge's evaluation process was their complete reversal on Salesforce integration requirements. "Being built natively into Salesforce was kind of a prerequisite for me," explains Eric Myll. However, this assumption was quickly challenged when he began speaking with sales managers and representatives.

"I assumed reps would say, 'you've given me another tool, I have to bookmark another login,'" Myll recalls. "But it turns out they actually are fine, if not prefer, just going straight to Subskribe and building it there."

The reason? According to Myll, "Reps Salesforce just generally… they find it slow and cumbersome, and look to leverage other tools to complete their work.." This insight led to a fundamental shift in their evaluation criteria, with Merge realizing that a modern, standalone interface with strong Salesforce integration was actually preferable to a native Salesforce solution.

"Subskribe is the most intuitive tool our reps have ever used. It's the fastest path to self-sufficiency I've seen - even reps who struggled with all other CPQs get how to use it and can work independently."

Eric Myll

VP of Revenue Operations and Customer Success

Why Subskribe?

After evaluating multiple vendors, Merge chose Subskribe because:

- **Modern Standalone Interface**: Sales representatives strongly preferred Subskribe's independent platform over Salesforce-embedded solutions
- **Superior Amendment Handling**: Subskribe demonstrated more robust capabilities for managing complex mid-term amendments
- **Most Intuitive Interface**: "It's the fastest path to self-sufficiency on a quoting tool for most reps that I've seen," said Eric
- **Scalable Platform**: Subskribe's functionality aligned perfectly with Merge's growth trajectory
- **Strong Salesforce Integration**: While operating independently, Subskribe maintained the necessary data synchronization with Salesforce

The Transformation

The move to Subskribe delivered dramatic results::

- **Complete Self-Service**: Reps can now handle most quotes independently, even those who "struggled with all CPQs they've ever used."
- **Minimal Training Required**: New reps quickly become self-sufficient after basic training.
- **Error Elimination:** The automated system significantly reduced calculation and data entry errors.
- **Faster Quote Generation**: Quote creation time decreased dramatically.
- **Scalable Operations**: RevOps team freed up to focus on strategic initiatives rather than quote review.

Biggest Takeaway

According to Eric Myll, Subskribe's greatest value is its long-term scalability: "I want to buy this one and be on it forever, because the only thing worse than implementing a CPQ is reimplementing." For growing companies like Merge, scaling quote operations without sacrificing quality is invaluable.