



Project takeover sees the CPQ improvements and value-add SurePrep was seeking

The Solution: Salesforce Field Service, CPQ, and Sales Cloud

Founded in 2002, SurePrep is a leader in 1040 tax automation for CPA firms. They provide innovative and comprehensive 1040 tax automation solutions—including their two-time award-winning mobile solution, TaxCaddy. Their solutions are utilized by over 23,000 tax professionals, running the gamut from sole practitioners to Big 4 firms.

With their focus on solutions to optimize and improve their clients' operations, they knew they couldn't overlook any inefficiencies within their own organization. A previous implementation of the Salesforce platform had been done incorrectly, and in order to continue delivering at a high standard, a recovery plan was needed as soon as possible.

Pinpointing problems and finding a way forward

Finding a fix-it team with first-hand industry experience, who understood the problems and pressures they were facing, was the project's starting point. Our team performed a thorough evaluation of SurePrep's current Salesforce solution, which found immediate issues.

SurePrep was unable to quickly and efficiently provide Salesforce CPQ quotes, were still using Word 'Mail Merge' to email quotes, and their NDA forms were being signed both manually and via email—which created inconsistencies.

The use of manual processes was causing other issues as well. Special instructions were getting lost from the manual quotes and not included in the Salesforce CPQ quotes, and multi-year discounts and renewals, also done manually, were disorganized. Additionally, pricing or rule changes overly complicated their manual quoting process; and new hires were struggling to understand this confusing system.



Salesforce products deployed:

Sales Cloud
Salesforce CPQ
Lightning Upgrade

SurePrep Quick Facts:

Location: Irvine, CA
Employees: 250-500
Business Model: B2B
Industry: Software

**"Excellent to work with.
Highly knowledgeable.
Appropriate time spent
scoping the project which
allowed for a reliable SOW"**

- Peter Miele, VP of Sales



888.931.0030
diabsolut.com
info@diabsolut.com

Upgrades and solution refinement for streamlined results

To put SurePrep on the road toward a more capable solution and improved processes, a platform upgrade was performed, taking them from Salesforce Classic to Salesforce Field Service. This would enable them to achieve the functionality they were looking for, as well as give them room to grow. Sales Cloud was assessed and CPQ was added and optimized to address some of the gaps they were experiencing with manual processes.

Conga was collaboratively chosen as the best tool for a consistent and easily managed quoting format, CPQ quote templates were added to streamline and regulate their quoting process, and new quoting fields meant they were able to capture their much-needed special instructions—helping to streamline their renewals and add-ons.

To dramatically upgrade their manual NDA process, our team created a new Salesforce NDA object to store the signed NDA, leveraging Conga for the format and Adobe eSignatures to improve approvals. Pricing and discount rules were re-engineered to correct pricing and support multi-year requirements; and to support new employees, detailed desktop procedures for their CPQ process were provided.

Increased opportunities and improved responsiveness

With the work and knowledge transfer completed, SurePrep was able to completely modernize their CPQ process and give their organization the ability to better scale and adapt in the future. It was all about finding the right tools for their individual business.

“The team quickly assessed our Salesforce CPQ and Sales Cloud issues and developed and delivered a recovery plan for the many major inefficiencies we were facing due to a prior failed implementation performed by another consulting firm.”

SurePrep’s quoting process is now completely streamlined, with inefficiencies gone, and Sales Cloud and SFS providing organized and centrally stored account details, specialized information, and customer data. They achieved a clearer big picture view from quote to payment for their CPQ process, with more intuitive learning for new hirers, and a net gain of overall responsiveness.



Integrations:

Adobe e-Sign
API
Conga

Net gain of
overall
responsiveness
with
opportunities &
quotes

Provided detailed desktop
procedures for their
CPQ process

Supporting their new
employee hires and growth

