

SUCCESS STORY

Watermark - Lead to Revenue Optimization and Integration



CHALLENGE

Faced with challenges stemming from legacy M&A activities, including poor data quality, siloed operations, and inconsistent processes, the client struggled with manual reporting and a lack of integration between sales and finance systems. StreamForce stepped in to implement robust data cleansing and enrichment solutions, standardize lead and opportunity management, and advance CPQ capabilities through Salesforce Revenue Cloud. To improve customer engagement, the team refreshed the customer community using Salesforce Experience Cloud. Additionally, over 15 cloud-based tools—including JIRA, Marketo, Parley Pro, and Sage Intacct—were seamlessly integrated via an iPaaS platform, eliminating data silos and enabling a single source of truth. Custom Salesforce development with APEX and Lightning Web Components further enhanced the solution, while connecting previously disjointed sales and finance operations.

Watermark Insights is a leading provider of educational software solutions aimed at improving student learning outcomes and institutional effectiveness. Their suite of products includes tools for assessment, accreditation, faculty activity reporting, course evaluations, and learning outcomes measurement. Watermark's platform helps educational institutions gather and analyze data to inform decision-making, enhance teaching and learning, and demonstrate accountability. By streamlining these processes, Watermark Insights supports schools, colleges, and universities in achieving their goals of continuous improvement and academic excellence.

New York City, NY
251-500 Employees
K-12 & Education

SOLUTIONS

To support a fast-scaling Go-To-Market strategy, StreamForce implemented a comprehensive data cleansing and enrichment solution to ensure accurate, actionable insights across the business. The team enabled a new GTM engine by delivering end-to-end lead management, optimized opportunity forecasting, and advanced CPQ capabilities—supporting complex asset and subscription models, automated renewals, and dynamic product bundling with flexible pricing. A costly data lake, ETL, and reporting stack was replaced with a more efficient BI solution, empowering business users to build reports from a consistent, trusted data set. The customer community was fully refreshed to improve self-service and reduce support cases, incorporating single sign-on and real-time chat functionality. To unify the broader tech ecosystem, StreamForce implemented an iPaaS solution, streamlining and standardizing integrations across 15+ cloud applications.

RESULTS

The transformation led by StreamForce delivered measurable outcomes across the organization. A unified foundation was established to foster cross-functional collaboration, while standardized processes brought greater predictability to results. Sales quoting became significantly faster and easier, freeing up sellers to focus on revenue-generating activities instead of administrative workarounds. With a 360-degree customer view in Salesforce, teams gained real-time insights to support continuous engagement, upsells, and cross-sells—now contractible at any point in the customer journey. Seamless integration between Salesforce and Sage Intacct eliminated data silos, while approval workflows were streamlined through the introduction of a centralized DealDesk. Success planning features were added to track customer outcomes, and project creation for implementation services was automated. Ticket management also improved, with enhanced information sharing between applications. Altogether, the initiative strengthened data integrity and reporting, empowering the business to more effectively prospect, close new deals, and expand within existing accounts.

AT A GLANCE

Benefits

- Simplified quoting, streamlined approvals via DealDesk, and real-time visibility into customer data enabled sellers to focus on revenue-driving activities, accelerating the sales cycle and improving deal quality.
- Standardized processes, automated project creation, and integrated systems (Salesforce, Intacct, and others) drove cross-functional collaboration and consistency across sales, service, and finance.
- A 360-degree customer view, success planning tools, and improved data integrity enabled better forecasting, proactive upselling/cross-selling, and more personalized service through refreshed self-service and support experiences.

Challenges

- Fragmented Data and Poor Quality
- Disconnected Systems and Manual Processes
- Operational Silos and Over-Engineered BI

SERVICE PROVIDED

- Enterprise Transformation Services
- Mergers & Acquisitions
- Customer 360

ABOUT STREAMFORCE SOLUTIONS

At StreamForce Solutions, we empower organizations to achieve growth through innovative technology solutions and expert guidance. Our team of digital transformation specialists has extensive experience across various sectors, including SaaS, High-tech, Private Equity, Education, Healthcare, Manufacturing, Finance, HR & Payroll, Retail, and Automotive.

We deliver tailored solutions to meet unique client challenges, focusing on value creation, business process standardization, systems optimization, and robust Go-to-Market tech stacks. Our services span engineering, cloud transformation, and product development, leveraging the latest technologies and frameworks, including Generative AI. We enable hyper-automation and provide strategic AI proof of concepts and labs to showcase value. With a global delivery model and over 120 certifications, we ensure top-quality service and support.

