

SUCCESS STORY

Salesforce – Lead to Revenue Reimplementation



CHALLENGE

Perceptyx, a forward-thinking organization focused on employee surveys and insights, faced several challenges with their Salesforce instance. Their existing Salesforce environment was burdened with heavy technical debt and non-scalable Apex code. A series of manual processes around managing opportunities, quoting, renewals, and amendments drained significant time from their sales agents. Moreover, complex product pricing and configuration rules made it difficult to efficiently price and configure offerings, while issues with unreliable customer data and duplicate records hindered business operations.

SOLUTIONS

StreamForce was brought in to address these challenges, starting with an extensive health check of Perceptyx's Salesforce environment. This evaluation led to the identification of key areas for improvement and set the stage for a comprehensive transformation. StreamForce initiated the transformation by conducting a thorough health check of the Salesforce platform and developing a roadmap for an ideal future-state architecture, identifying inefficiencies, technical debt, and misaligned configurations. Following this, they standardized the Salesforce Sales Cloud and CPQ processes, re-implementing them with industry best practices to automate sales and quoting processes, including Contract Lifecycle Management (CLM), ensuring streamlined operations across departments. A key achievement was the automation of critical processes like renewals, amendments, and subscriptions, eliminating manual tasks and allowing Sales Reps, Customer Success Managers (CSMs), and the RevOps team to focus on high-value activities. StreamForce also collaborated with various teams within Perceptyx, including RevOps, Finance, Customer Success, Marketing, and Customer Support, to create a comprehensive Customer 360 platform, providing a reliable and unified source of customer data. Finally, StreamForce provided ongoing Salesforce support and maintenance services, ensuring the platform remained scalable and adaptable to future business needs.



Perceptyx is a company that specializes in employee surveys and people analytics solutions. It helps organizations improve employee engagement, productivity, and overall workplace culture by providing insights through customized surveys and advanced data analysis. Perceptyx's platform enables organizations to gather real-time employee feedback, analyze the data, and implement strategies to drive positive change. With a focus on enhancing employee experience, Perceptyx supports businesses in creating a more engaged and motivated workforce.

Temecula, CA
51-200 Employees
Human Resource

AT A GLANCE

Benefits

- Seamless Data Migration
- Automation and Efficiency
- Scalability
- Reduced Downtime
- Comprehensive Data Retrieval
- Improved Security Compliance

Challenges

- Access Restrictions
- Security Compliance Constraints
- Data Cleanup Needs
- Attachment Migration Complexity
- Coordination Between Teams

RESULTS

The transformation resulted in significant improvements across the organization. Sales Reps, CSMs, and the RevOps team were able to focus on core activities rather than spending hours managing Salesforce data, as automation streamlined workflows and improved efficiency. With a reliable and trusted Customer 360 platform in place, Perceptyx gained confidence in their customer data, including product ownership details, setting the stage for future growth and easier integration of acquisitions. StreamForce's solution also provided the scalability needed to quickly integrate acquisitions made between 2021 and 2023, accelerating Perceptyx's growth strategy. Additionally, StreamForce's expertise and ongoing support significantly reduced technical debt, allowing Perceptyx to rely less on technical resources and better leverage Salesforce's native capabilities.

SERVICE PROVIDED

- Salesforce Re-Implementation
- Salesforce CPQ Standardization with Best Practices
- Ongoing Managed Services



“Streamforce has been a great partner with Perceptyx, being both responsive on requests as well as implementing complex system changes from requirement documents, as well as completing implementation of a very complex pricing methodology in SFDC CPQ.”

Ryan Burghard
Director of Revenue
Operations

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.

