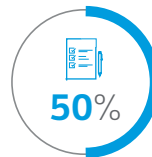


Salesforce CPQ builds scalable, trusted revenue engine for life sciences growth

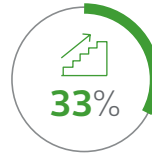
RSM centralizes pricing, approvals and real-time quoting in a single system

KEY TAKEAWAYS

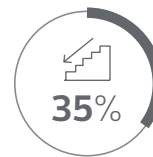
1. A growing life sciences company struggled with dated and manual quoting and approval processes.
2. RSM implemented Salesforce CPQ to establish consistent, efficient and reliable processes.
3. The trusted Salesforce forecasting platform has enhanced quoting, productivity and cost savings.



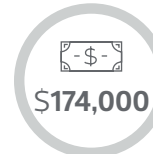
faster quoting



increase in quotes per rep



reduction in errors and approvals time



annual savings

Our client is a growing life sciences manufacturer that provides critical products and services to help biotech, biopharma and life sciences companies deliver novel vaccines, therapeutics and diagnostics. The company faced commercial complexity, with employees leveraging outdated quoting processes, manual user-created quotes, inconsistent pricing and inefficient approvals. Amid this challenging environment, users had limited trust in their [Salesforce](#) system for forecasting.

To address these processes, the company selected RSM to design and implement Salesforce CPQ (configure, price, quote) as a governed, scalable revenue engine, transforming quote configuration, pricing calculations and approvals within a single, reliable system.

The challenge: Manual quoting and disconnected processes

The organization's quoting environment reflected the realities of a fast-growing scientific manufacturer. Users relied on multiple spreadsheets and disconnected inputs. Sales personnel pulled pricing from several sources and created quotes manually, while approvals were tracked separately through emails, phone calls and shared files.

The company's product portfolio includes a large catalog of off-the-shelf products, with duplicate entries and

pricing discrepancies often occurring. The organization also faced significant complexity managing catalog products alongside highly customizable scientific products with multiple discounting methodologies and cross-functional dependencies between sales, product and manufacturing teams.

Different teams depended on quote-related information, but these processes were not managed within a single system, resulting in several critical challenges for custom projects, including:

- To develop specifications, sales teams needed to understand what was possible
- Product teams needed to implement pricing rules to guide sales for customer quotes
- Manufacturing teams needed final specs to actually develop the product

Multiple discounting methods further complicated processes, with the company using:

- Volume-based discounts for catalog products
- Distributor discounting
- Account-based or contracted pricing
- Multiproduct discounting across custom products



Users pulled these details together across multiple spreadsheets and tracked quote review, pricing and approvals using SharePoint.

The solution: Centralized quoting, pricing and approvals with Salesforce CPQ

RSM architected a Salesforce CPQ solution not just as a quoting tool, but as the operational backbone connecting commercial, technical and manufacturing logic. The new foundation enables users to efficiently and accurately configure quotes across catalog and custom products within a single system. Salesforce CPQ eliminated spreadsheets and enabled real-time calculation of catalog pricing, including bulk and volume discounts, as users added products and adjusted quantities.

For custom products, RSM introduced a guided form to capture required and optional attributes. The attributes determined base pricing, with users able to apply adjustments as needed. The most complex products were supported with bespoke pricing.

In addition, the RSM team transitioned all approvals into Salesforce, with streamlined, automated processes within advanced approval workflows. These included peer review and approvals based on discount levels and overall quote value.

RSM also configured a single quote template to support all product types. Users can control sections within the template based on quote-level attributes, including whether to show or hide discounts, add additional language, or display detailed pricing tables.

The RSM team delivered additional solutions to optimize the company's sales processes, including:

- Estimated tax calculation using Avalara
- Estimated shipping calculation within the quoting process
- Output templates to seamlessly transfer custom product manufacturing attributes to NetSuite

Incorporating a strategic acquisition

In a rapidly changing biotech environment, the company acquired key intellectual property that altered the commercialization model for a complex product family.

However, the architecture developed by RSM evolved seamlessly and demonstrated resilience during product growth. The introduction of an external custom mRNA builder into the company's e-commerce platform altered how the product family was quoted. To support this change, RSM restructured the CPQ configuration for that specific category into a bundle-based model with updated pricing rules.

The RSM team also updated the quote template to automatically organize, sort and summarize products based on bundle configuration.



I absolutely loved the RSM team. The project was very well run and very organized, and it had a good cadence. RSM's level of experience, professionalism and personal engagement are all five stars.

Project Manager, life sciences company



Outcomes and results: Improved quoting, governance and visibility

Following the implementation, Salesforce became a trusted forecasting platform for the organization. Commercial leadership gained clearer visibility into pipeline activity, while manufacturing and operations teams benefited from earlier and more reliable insight into upcoming production demand. The organization quickly reported significant improvements across functions, including:

- 50% faster quoting
- 33% increase in quotes per representative
- 35% reduction in errors and approvals time
- \$174,000 total annual savings

Significant efficiency and capacity gains

- 650 hours of new revenue-generating capacity
- 81 days of quoting time saved annually
- 278 hours saved per rep annually in quoting time
- 1.11 hours saved per rep per day



Substantial cost savings

- \$10,400 savings per rep from faster quoting
- \$73,000 savings across the department (quoting efficiency)
- \$24,000 savings from reduced approval/error time
- \$76,600 in labor/training-related savings

"Salesforce CPQ has been hugely helpful to our organization," says the project manager. "We have a better line of sight to the orders that are coming through the pipeline and thus a better understanding of our forecasting and what our manufacturing and operations team will ultimately be executing on in the short-term time frame."

Looking ahead: Advancing automation and quoting capabilities

While the organization has developed greater familiarity with CPQ-based quoting tools, their collaboration with RSM has extended well beyond go-live. The RSM team continues to support the Salesforce environment across opportunity management, case management, territory alignment, security governance and ongoing CPQ optimization, improving maintainability and architectural integrity.

In addition, the RSM team has continued to pivot quickly and deliver resources and solutions that align with the company's needs and growth goals. For example, organizational leadership is increasing their focus on account engagement efforts moving forward. To help achieve those goals, RSM is working with the company to optimize Agentforce agentic artificial intelligence functionality to elevate customer service, sales and operations efforts.

By continuing to cultivate a successful relationship, RSM has become a key element in the company's commercial technology ecosystem. "RSM is a fantastic advisor," a company representative shared. "RSM is not only technically proficient in the tools our organization uses, but they possess a wealth of internal thought leaders who help our team align on the best possible system design and architecture for our organization."

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