

CASE STUDY

# Blueshift gets deals approved 500% faster with sales workflow automation



Sales teams are responsible for as much as half of a company's value creation<sup>1</sup> which makes their effectiveness extremely crucial for growth. But improving the culture and effectiveness of an established team is challenging, and today's hybrid work environment adds an extra layer of complexity.

By adopting DealHub, Blueshift ushered in a new era for its sales team. Today, their Account Executives (AEs) engage buyers earlier in the sales process and send order forms accurately the first time. Also, AEs and sales leaders can manage discounts and approvals much more efficiently. Thanks to a higher level of professionalism and implementation of best practices, Blueshift gets deals approved 500% faster, which enables them to win deals more frequently when up against their competitors.

1. ["McKinsey: For top sales-force performance, treat your reps like customers"](#)







## About Blueshift

**Blueshift** is a SmartHub Customer Data Platform that combines customer data, AI, and omnichannel orchestration.

## By the Numbers

- 500%** Increase in speed of quote approvals
- 100%** Faster implementation than other CPQ deployments
- 80%** Decrease in sales team inquiries to the operations team

## Solutions Used

-  CPQ
-  DealRoom
-  Contract Management
-  Subscription Management
-  Document Generation
-  eSign

# Key Challenges



- **Slow discount approval and sales velocity**

In today's competitive software market, sending an accurate SLA in a timely fashion is key to winning deals. Blueshift needed a Configure Price Quote (CPQ) solution to streamline the process for creating accurate SLAs and securing discounts approvals. Without DealHub, it typically took Blueshift 24 hours to turn around an approved SLA and quote, which is much longer than average.<sup>1</sup>

- **Leaving Salesforce CPQ for DealHub**

Blueshift wanted to be able to make changes, in its backend, quickly on price books, configuration, playbooks, and workflow changes as it scaled its product.

Before DealHub, Blueshift had been using Salesforce CPQ, which was difficult to update without using internal developer resources. Blueshift needed a more flexible and scalable CPQ, as well as a guided selling mechanism that shows AEs the exact SKUs to sell – and doesn't force them to choose from an overwhelming variety of seemingly appropriate options.

- **Poor revenue visibility**

Companies have difficulty improving business processes when they don't have good visibility of their revenue cycle. Without a clear understanding of the status of deals, the finance team at Blueshift was hindered in their ability to forecast quarterly revenue. This also slowed their ability to collect payments, since it was not always clear in the CRM from whom they should be collecting.

In addition, since sales leaders had no central location to track discount approval requests, it was impossible to monitor trends and make educated decisions about the ideal discount for every product package.

- **Difficulty creating accurate and professional order forms**

Owing to a lack of sales guidance, AEs frequently sent inaccurate order forms to potential buyers, leading to unnecessary iterations, harming Blueshift's credibility, and occasionally causing buyers to back out. In addition, Blueshift's Deal Desk regularly needed to verify that AEs didn't overcommit in the service-level agreement (SLA) and weren't missing an opportunity to maximize revenue potential.

1. [2021 B2B Benchmark Report for Revenue Leaders](#)

# Key Successes



- **An efficient approval workflow**

Thanks to DealHub, discount and SLA approvals are now typically approved in less than four hours, as opposed to 24 hours. By implementing a better way to create quotes and manage approvals, their sales operations team streamlined the entire deal flow.

- **Greater visibility into the revenue process**

Sales leaders are now able to keep discounts in check, follow trends in how discounts impact win rates, and determine how far AEs should go in providing discounts when competing with certain companies.

In addition, financial leaders no longer need to track down AEs and/or buyers in order to collect revenue, since all the relevant information is automatically synced between DealHub and Blueshift's Salesforce CRM.

- **A better buyer experience through accurate and professional sales proposals**

Thanks to DealHub, BlueShift now provides branded and fully customizable DealRooms – where they can incorporate accurate price quotes, up-to-date Terms of Services, e-signatures, and more. Sales reps can then easily invite relevant buyers and stakeholders into each interactive DealRoom.

By centralizing important details, updates and documents in one place, BlueShift can now move deals forward in one fluid sales motion.

**Ready to Amplify  
your Revenue?**

**Request a demo**

“Enforcing best sales practices through DealHub CPQ is priceless. We have elevated the buyer’s experience through earlier sales engagement, a quicker approval process, and accurate order forms.”



**Saro Zargarian**  
Senior Director of GTM Ops  
Blueshift

