

# QUOTE-TO-CASH CERTIFICATION

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Module 2, Part 1  
Process

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## Quote-to-Cash Process

*What this module will cover.*

1. What the Quote-to-Cash process entails
2. What the key signs of Quote-to-Cash process issues?
3. What are Quote-to-Cash Process applications and how do they help?

Introduction

Quote-to-Cash Process

Signs of Quote-to-Cash Issues

Quote-to-Cash Automation

5 Ways Quote-to-Cash Process  
Automation Helps

## Gene Eun

Product Marketing Director, Platform Products, Apttus

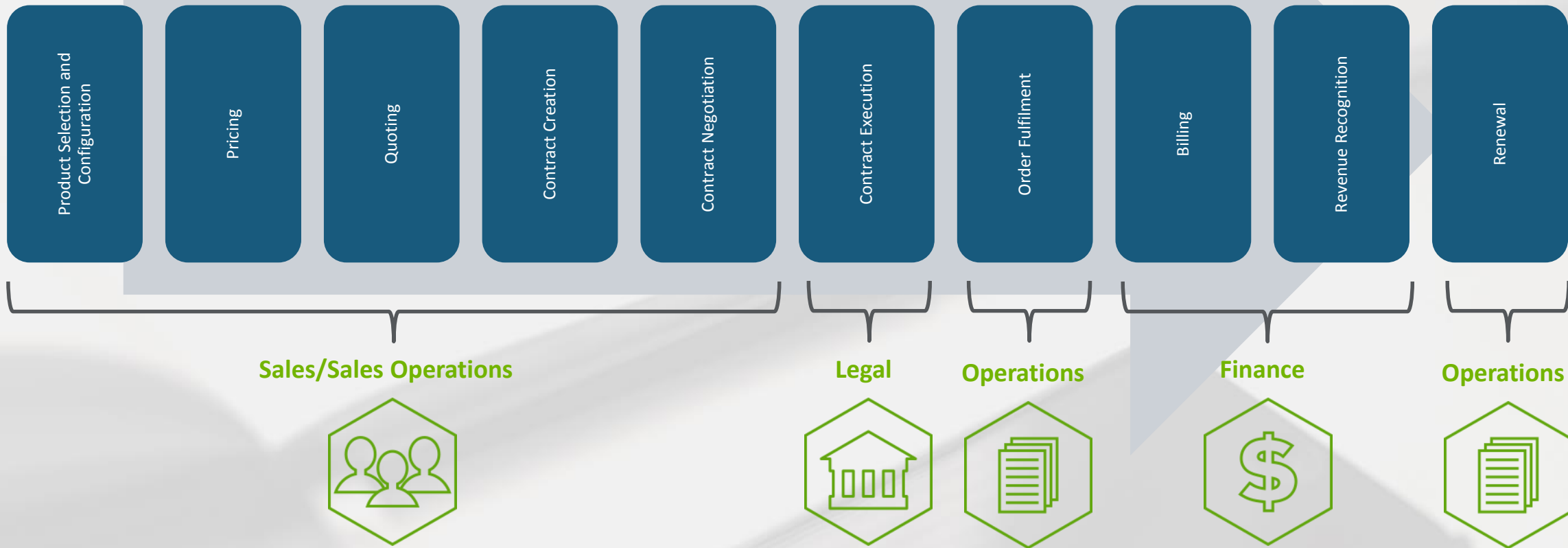


- Manages all strategic marketing efforts related to Apttus Intelligent Cloud
- Authors internally and externally published content about Apttus' Intelligent Quote-to-Cash platform
- Enterprise software product marketer and product manager for over 15 years

Contact Info: [geun@apttus.com](mailto:geun@apttus.com)  
[www.linkedin.com/geneun](http://www.linkedin.com/geneun)

# Quote-to-Cash Process

## The 10 Key Steps in Quote-to-Cash



# Signs of Quote-to-Cash Issues

## Sales/Sales Operations



- Selling inefficiencies and deal slippage
- Lost sales due to poor responsiveness
- Missed cross-sell and upsell opportunities

## Finance



- Insufficient revenue growth and profitability
- Revenue leakage due to rogue discounting
- Poor visibility to deal flow impacting financial process

## Legal

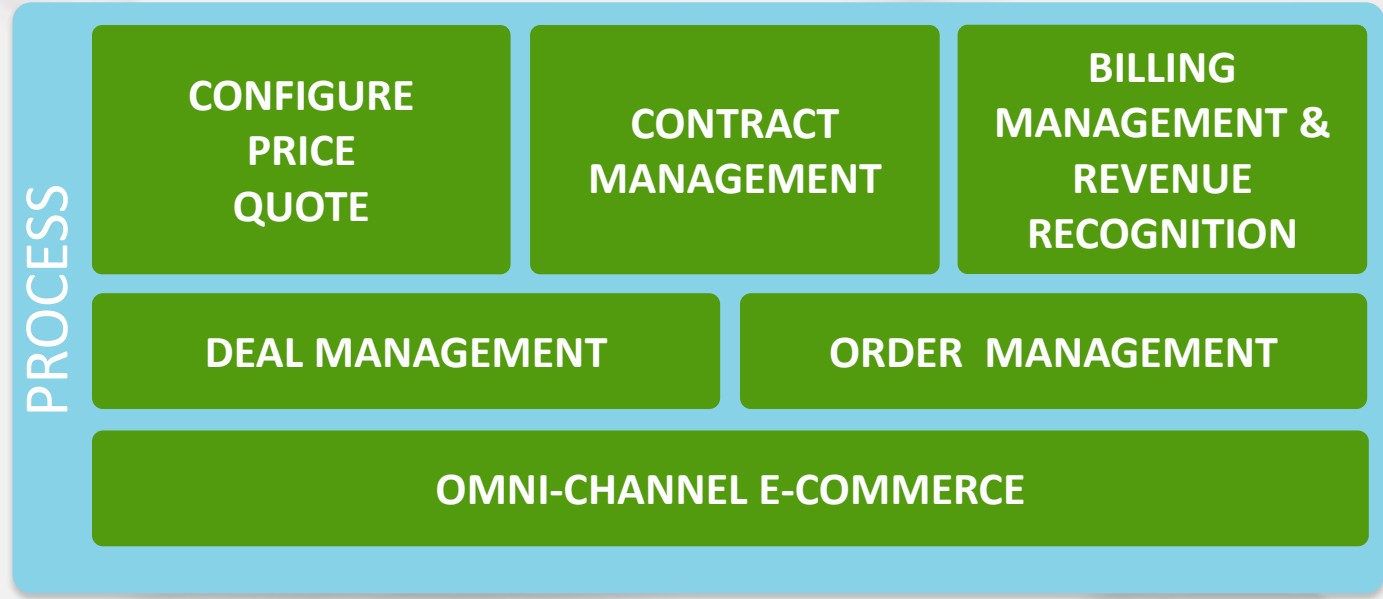


- Lack of visibility and control over contracts process
- Compliance risk
- Contract process inefficiencies due to errors and use of non-standard terms

## Operations



- Inefficiencies due to inaccurate and delayed orders
- Missed renewals
- Manual processes and integration



# 5 Ways Quote-to-Cash Process Automation Helps

1. Accelerate revenue and margin growth
2. Increase quote, contract, and order process efficiency
3. Shorten Quote-to-Cash cycle times
4. Improve customer satisfaction
5. Reduce compliance risk



# There is More for Intelligent Quote-to-Cash

Process automation is not enough: Must drive behaviors and intelligence

## Process

### Automating end-to-end processes

Configure Price Quote (CPQ), Contract Management, Order Management, Revenue Recognition, Billing, Renewals, from all channels (E-Commerce)

## Behavior

### Influencing behaviors of buyers, sellers and partners

Promotion Management, Rebate Management, Commissions and Sales Incentives

## Intelligence

### Embedding intelligence into process with data driven insights and recommendations

Artificial Intelligence (AI), Machine Learning, Natural Language Processing, Conversational Interfaces