

5 Steps to a Holistic Lead-to-Cash Process

As a business leader, getting a holistic view of each step in your lead-to-cash process begins with lead generation all the way through to final payment. This gives your people the tools they need to streamline operations and focus on core business initiatives.

Why You Need to Optimize



IMPROVE DATA QUALITY

Integrate your CRM and accounting/ERP systems to collaborate with sales and share pricing data.



SAVE TIME

Eliminate manual data re-entry and free up your finance team to focus on strategic work.



MINIMIZE ERRORS

Automate repetitive manual processes to reduce human error and costly mistakes.

1 Lead to Qualify

Develop lead and partner relationships to turn them into customers. Sales, marketing and finance teams manage current deals and create product specs to address customers' needs.



2 Qualify to Order

Generate quotes quickly and accurately by implementing a configure, price, quote (CPQ) system. Create complex quotes customized around bundles, products, quantities and prices. With a 360-degree view of customers, you'll understand their purchase cycles and geographies.



3 Order to Cash

Handle, track and manage order life cycles with fulfillment, jeopardy and fallout analytics once orders are entered into your CRM. Manage error-prone contract amendments and dynamic terms and conditions in a unified system.



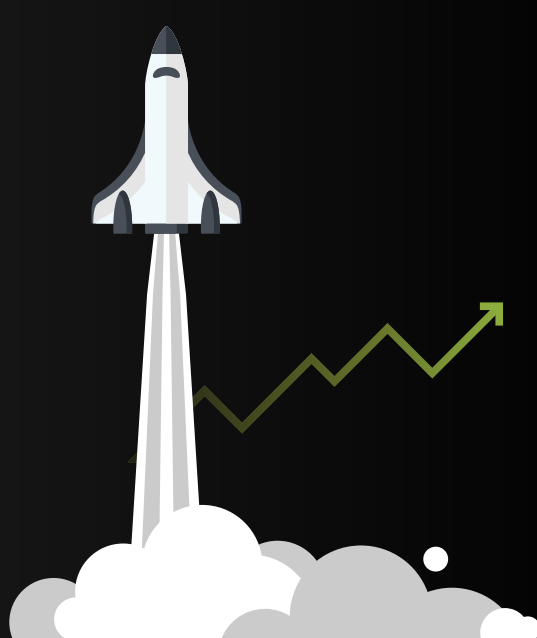
4 Cash to Care

Leverage your streamlined lead-to-cash process to provide customers effective resolutions for billing inquiries, troubleshooting and customer service.



5 Retain to Grow

Drive strategic growth by nurturing your valued relationships with customers. Provide AI-powered analytics and recommendations, create custom loyalty programs or offer self-care functionalities. Better identify cross-selling and upselling opportunities.



Gain a holistic view of your lead-to-cash process by connecting your sales and finance teams today!

Contact our experts to learn how you can optimize your lead-to-cash process.

