



## WORLDATWORK USES SALESFORCE SALES CLOUD AND CPQ TO ENHANCE CUSTOMER EXPERIENCE AND EMPOWER ITS SALES, PUBLICATIONS, CUSTOMER RELATIONSHIP AND FACULTY MANAGEMENT TEAMS

### | OVERVIEW

WorldatWork is a non-profit organization that provides thought leadership, comprehensive education, certifications, research and advocacy to human resources professionals working throughout the world. Its mission is to be the authoritative source for those seeking knowledge and connection as they work to attract, retain, motivate and engage the workforce.

WorldatWork serves more than 70,000 members and subscribers worldwide. However, as its community continued to grow, the functionality of its legacy member management software did not meet certain business requirements. As a result, it found itself in a static environment with little room for scalability. The legacy system was difficult to use, resource-intensive and lacked flexibility to add consistency in their sales process. WorldatWork looked to Mastek to develop a solution that would enhance their lead tracking process, accelerate quoting, automate the publication process and offer clients a streamlined, user-friendly experience.

### | CHALLENGE

Prior to launching the new solution, WorldatWork was missing important collaboration tools and had little insights into key performance metrics. This led to an inability to visualize the sales pipeline and an overly complex product structure and quoting

process. In addition, its teams relied on manual processes to provide approvals on discounts and track leads and publications. Due to these challenges, WorldatWork needed a system that would increase the efficiency and effectiveness of its teams while sustaining future growth of the organization.

### | BY THE NUMBERS

- Product List reduced from 35,000 to 4,000 items
- 100% discount policy adherence in Salesforce guaranteed
- Improved user experience and flow for processing deals
- Reduced time spent on quote creation and approval
- Comprehensive view of customer engagement with reports and dashboards
- Quick and easy tracking of the publication process, including peer review
- Automated accounting of SFDC Opportunities

## | SOLUTION

After reviewing the organizations needs and existing platforms, Mastek configured Salesforce Sales Cloud and CPQ in a way that would increase user acceptance and create a 360-degree view of the customer. This combination of Salesforce products allows WorldatWork to streamline their product list, automate processes for quotes and publications and provides a comprehensive view of engagement with WorldatWork customers. The process of approving discounts was automated to make it easy to track and keep quotes and pricing consistent. Mastek also integrated other software with the Salesforce platform including DocuSign and Marketo, providing a single point of entry into multiple applications and empowering teams to work faster and smarter.

## | RESULTS

By utilizing the services of Mastek to implement Salesforce Sales Cloud, CPQ and a variety of integrated systems, WorldatWork was able to maximize team productivity and create a user-friendly experience that enhances deal visibility throughout the sales lifecycle.

Sales Cloud helps with tracking deals and has improved consistency in the sales process by letting employees move faster and manage customer relationships on a single application. Salesforce reports and dashboards can now be used to gain instant insights and a complete view of each customer's account, activity history and connections. The new CPQ solution has resulted in increased efficiency with quote creation and reduced approval times and errors through various task automations and easy-to-use templates. Under this configuration, WorldatWork immediately noticed the benefits and now has a platform that sets the company up for future growth.



## | KEY TECHNOLOGIES USED

- Salesforce Sales Cloud
- Salesforce CPQ
- Nonprofit success pack
- Marketo
- DocuSign
- Cvent
- Avalara
- Del Boomi
- NetSuite
- Thought Industries

## | ABOUT

Mastek is a turnkey & trusted Digital Engineering & Cloud Transformation partner that delivers Innovative Solutions and Business Outcomes for clients in Healthcare & Life Sciences, Retail, Manufacturing, Financial Services, Government/ Public Sector, etc. We enable customer success and business change programs by partnering with enterprises to unlock the power of data, modernize applications to the cloud, and accelerate digital advantage for all stakeholders. Customers Trust Mastek to deliver Business Value with Velocity and we operate in 40+ countries including the UK, Americas, Europe, Middle East, APAC with ~5000 employees. We are in the business of de-complexing Digital and making our clients future-ready with an industry-first approach. For more details, please visit our website [www.mastek.com](http://www.mastek.com).