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Challenge

CLA's existing CRM, NG, no longer met the needs of the business.

- Since the system no longer met their demands, they were having to do a significant number of manual process workarounds.
- The data model had limitations and the product roadmap was not aligned to the future business needs.
- CLA wanted to move to a modern cloud-based solution.
- NG had outdated desktop and client server-based technology.
- CLA wanted to move to a more modern cloud-based solution so they could benefit from more seamless upgrades and open Web Service integration standards.



Solution

Pracedo implemented Salesforce Sales Cloud, CPQ, and connected SAP using out-of-the-box functionality and best practices. This included:

- Lead and Opportunity management.
- Full CPQ set up or products, pricebooks, and quoting across all customer sectors.
- Customer onboarding process through custom fields.
- Automated processes for cancellations.
- Case management and entitlements for the customer service team.
- Invoicing and payment management.
- Integration with SAP.



Impact

CLA now have a true 360 view of their customers on a CRM that can grow and flex with their business needs. Benefits from the upgraded solution include:

- Management of multi-product journeys.
- Improved insights and reporting, specifically showing the best opportunities and highest value sectors.
- Freed customer service team from manual tasks.
- Enhanced efficiency of current business processes.
- Future-proofed CLA's CRM technology and ensured that CLA meets GDPR requirements.
- Maximised the out-of-the-box capabilities of Salesforce.
- Limited technical debt incurred through lots of code creation

A 360-degree view of customers

With Sales Cloud, CPQ, and SAP connected, CLA now have a comprehensive 360-degree view of their customers. This empowers them to gain more insight into their customer journey and make data-fuelled decisions.

A future-proofed CRM that can grow with the business

CLA's new CRM software, Salesforce, is more flexible and adaptable than ever before. The cloud-based nature of Salesforce allows for a more modern CRM solution that offers seamless upgrades and open web service integrations. This allows CLA to get more out of their CRM system - while also enabling their company to benefit from a CRM system that can grow with the business.



ELLIE COPP
CRO, Pracedo

For more information about this case study or how we can help you achieve success with a Sales Cloud, CPQ & SAP Integration, contact Ellie Copp at ask@pracedo.com