

From Salesforce data to a framed value case

Simulated value case with a working Salesforce extraction pipeline

Illustrative annual upside: \$1.4M at 50% capture

\$1.4M

Gross scenario across three overlapping opportunities, before deduplication. Full gap: \$2.8M.

Illustrative: 800 simulated opportunities in Salesforce's object shape (10.4 months). The same pipeline runs live on 40 seeded opportunities in a Salesforce trial org.

Accelerate bookings

EMEA discount approvals take 7.0 days vs 1.2 in the fastest region.

Improve win rate

19% of negotiated deals loop back for a re-quote; they win 31% vs 49%.

Sales productivity

12% of deals skip Qualification and win 18% vs 39%.

800

deals analysed

37%

win rate

33.9d

median cycle time

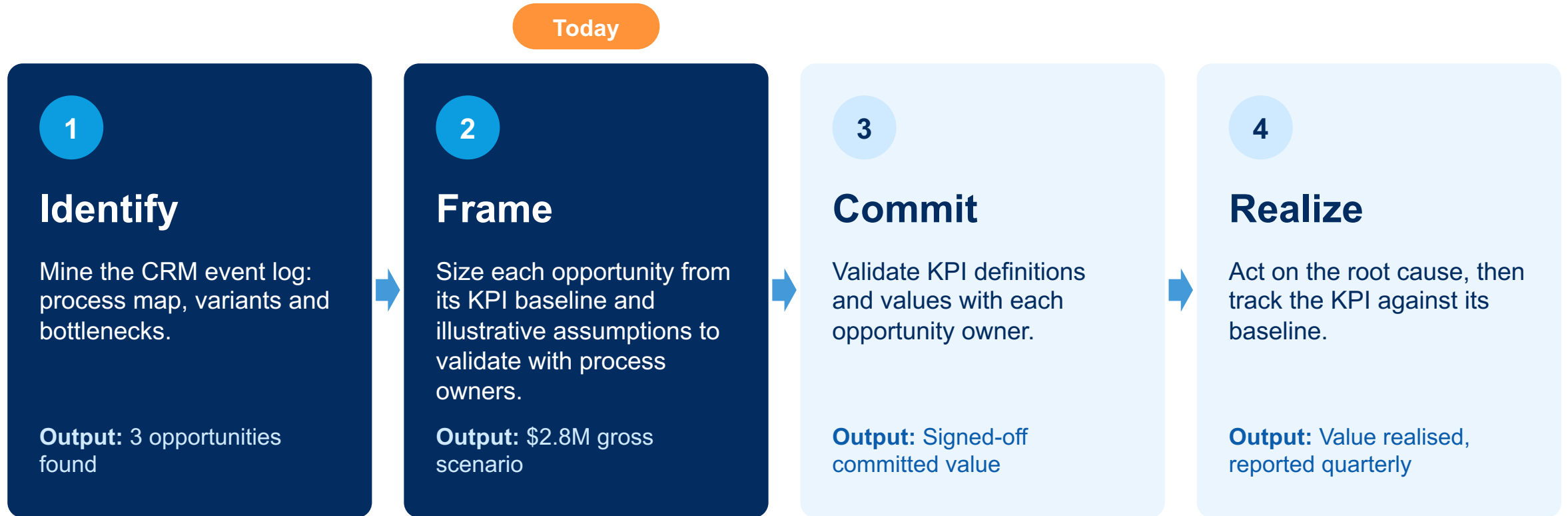
67

distinct paths

14%

match the winning trace

Approach: from finding value to realising it



This demo covers Identify and Frame on Salesforce data. Commit and Realize run with the customer's process owners.

Discover: paths in the simulated event log

14%

match the selected winning trace
(38% of won deals)

67

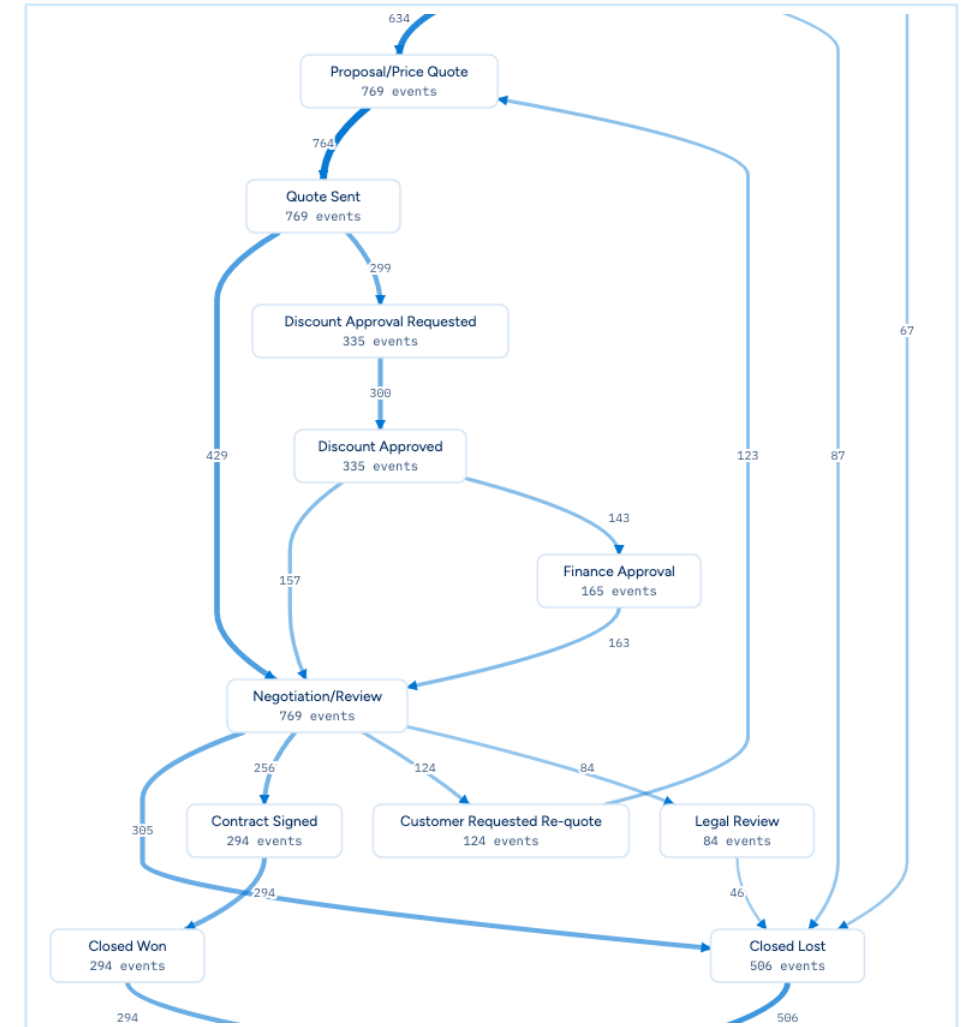
distinct paths across 800 deals

7.0 days

median EMEA discount approval,
the slowest region

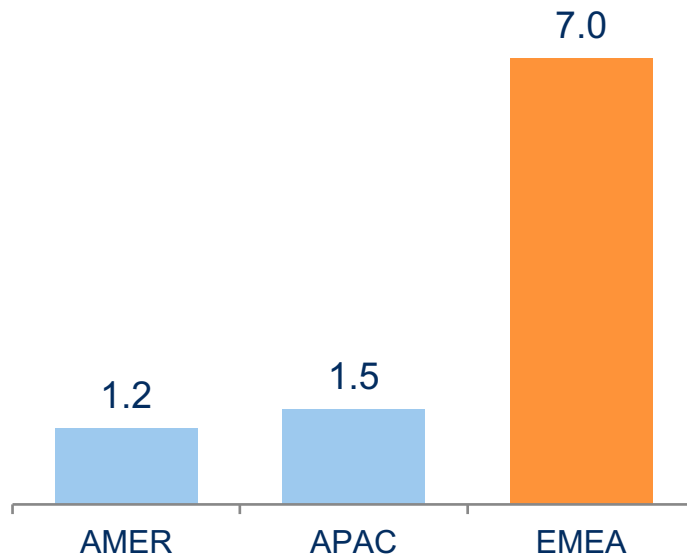
Approval steps and re-quote loops show up as detours from the winning trace.

[Open the live process map](#) →



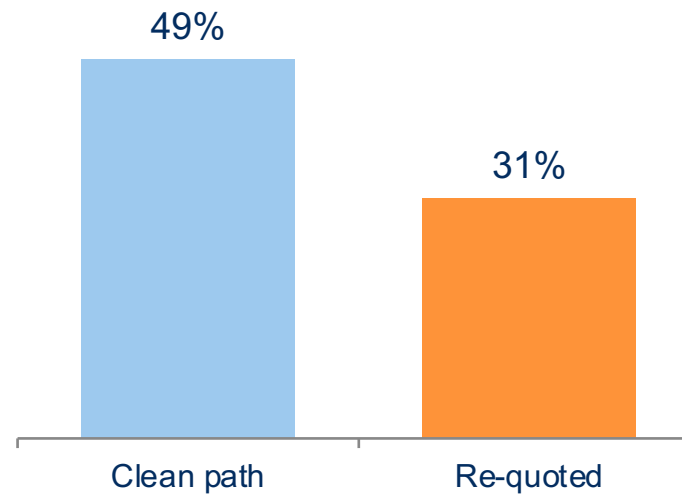
Diagnose: three patterns associated with lower win rates

Median approval wait (days)



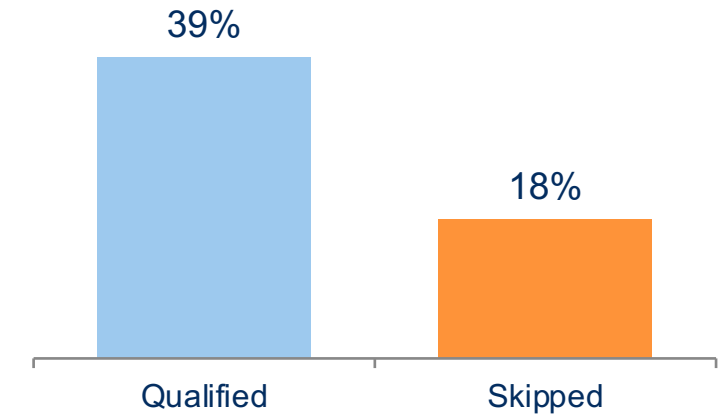
5.8 days slower than the fastest region. EMEA deals waiting >7 days won 47% vs 54% (n = 51 vs 52).

Win rate of negotiated deals



Re-quoted deals win 18 points less often (n = 124 re-quoted vs 521 clean).

Win rate by qualification



Deals that skip Qualification win 21 points less often (n = 99 vs 701).

Business case overview: three opportunities, one deep-dive

Objective	Opportunity	Proposed owner	Time to value	Full gap	Committed	Realized
Accelerate bookings	1 EMEA discount approvals	Deal desk lead	Short	\$213k	TBD	—
Improve win rate	2 Re-quotes (deep-dive)	VP Revenue Ops	Medium	\$1.33M	TBD	—
Sales productivity	3 Skipped qualification	Sales operations	Short	\$1.29M	TBD	—
Total (gross)				\$2.84M	TBD	—

Full gap = illustrative scenario from simulated Salesforce data. Committed is agreed with each owner after validation; realized is tracked against a frozen baseline.

Opportunities overlap

22 deals were re-quoted and skipped Qualification, 7 were re-quoted with slow approvals, 5 skipped Qualification with slow approvals.

So the total is gross: count each incremental deal win once across all three improvement opportunities before committing.

Before value is committed

- ☐ Deduplicate overlapping deals across opportunities
- ☐ Agree cohort, period and Amount basis
- ☐ Owner signs off KPI definition and improvement assumption
- ☐ Finance signs off the value formula

Value case: reduce re-quotes in quote-to-close

2025-10 to 2026-09, annualised · Reached Negotiation/Review · Amount = bookings · Proposed owner: VP Revenue Ops · Simulated data

Challenge

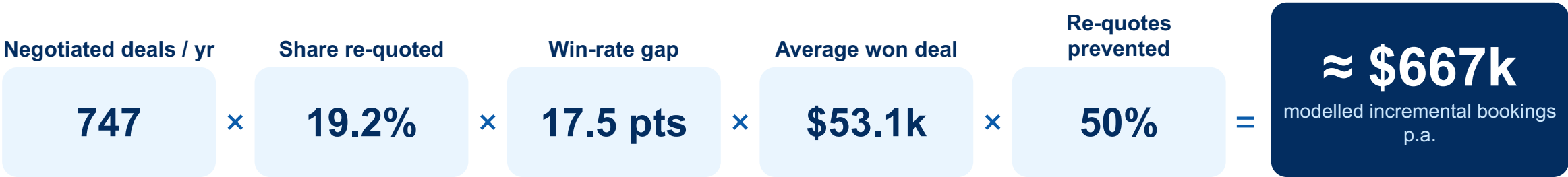
- 747 negotiated deals a year; 19% loop back for a re-quote
- Re-quoted deals win 31% vs 49%
- EMEA approvals take 7.0 days vs 1.2

Root cause (to capture)

- Reason codes: quote expired, discount, scope, pricing error
- Hotspots by approver queue, region and rep
- Test whether approval delay causes expiry and re-quotes

Solution with process intelligence

- Performance views show where quotes wait and loop
- Conformance checking flags skipped steps
- Simulate a pilot before any policy change



Scenario to test: cut re-quotes from 19.2% to 9.6% of negotiated deals, assuming each prevented re-quote recovers the 17.5-point win-rate gap. Measured against a comparison group; Finance validates incremental bookings, revenue recognition assessed separately.

Turning the finding into a decision

Validate

Run the extract on the production org; confirm cohorts, causes and overlap.

RevOps + SE · weeks 1–2

Pilot

Agree a controlled pilot with RevOps and Finance once re-quote causes are validated.

RevOps + Finance · weeks 3–8

Measure

Track share re-quoted and win rate against a frozen baseline and a comparison group.

Finance · monthly, signed off quarterly

Illustrative schedule; owners are proposed.

Decision today: agree the validation scope, named owners and pilot success criteria.