

Unlocking the Next Generation of AI-Enabled Revenue Operations

Migrating from CPQ to Revenue Cloud Advanced



In a digital-first economy, enterprises are under increasing pressure to modernize their revenue operations in order to stay competitive, scalable, and customer-centric. The traditional Quote-to-Cash (QTC) process - once viewed as a linear sales function - is now a strategic growth enabler that spans product configuration, pricing, contracting, billing, and revenue recognition.

However, legacy CPQ platforms are often rigid, fragmented, and unable to keep pace with evolving market demands. As businesses expand globally, introduce consumption-based models, and respond to increased audit scrutiny, they need a new model - one that would give them back the edge.

Salesforce Revenue Cloud empowers organizations to transform their sales and revenue lifecycle through AI-led automation, full lifecycle visibility, and seamless integrations. By migrating from legacy CPQ systems, businesses gain greater agility, compliance, and operational efficiency across quoting, contracting, billing, and recognition processes.

Key benefits include:

Simplified Opportunity & Quoting - Improve quote accuracy and reduce cycle times, leading to increased win rates and broader adoption of usage-based pricing.

Integrated Billing & Revenue Recognition - Shorten invoice cycles, reduce billing disputes, and ensure compliance with ASC 606 and IFRS 15 through automated revenue recognition.

Integrated Contracting - Boost compliance with standardized contract terms and streamline complex renewal and non-standard clauses.

Seamless Order Orchestration - Improve transparency across order workflows, cut operational costs, and enable intelligent handoffs between systems.

Lead-to-Cash 360° View - Gain end-to-end visibility with dashboards spanning campaigns, quoting, contracts, billing, and collections - driving smarter, faster decisions.

Brillio's RCA Migration Strategy

Brillio's RCA migration strategy is built to minimize risk while maximizing speed and business value. It is a structured, end-to-end approach that aligns cross-functional teams around clear goals and rapid execution.



Prep & Plan - We finalize transformation objectives - such as automated billing and contract management - and establish a unified, cross-functional project plan.

Assessment & Analysis - We analyze existing CPQ configurations and legacy processes, conduct fit-gap analysis, and define a sprint-based implementation roadmap.

Design - Align solutions with Salesforce best practices, finalize business decisions, and design the integrated architecture for data and workflows.

Process Re-alignment - Map existing processes to RCA product capabilities and address change impacts across personas and workflows.

Configuration & Customization - Configure RCA for business rules, integrate existing systems, and load data in alignment with operational needs.

Data Mapping & Transformation - Clean, transform, and simulate all Quote-to-Cash data - including pricing, contracts, and subscriptions - before migration.

Testing & Data Validation - Validate pricing data, contract logic, billing outcomes, and revenue schedules to ensure complete data integrity.

Deployment - Execute controlled cutover and production deployment with mock run-throughs in lower environments.

Hypercare - Deliver post-go-live support with daily feedback loops and handover to the steady-state team.

Minimizing Disruption During Transformation

Brillio ensures minimal business disruption across all critical revenue operations, including:

- Quote creation, pricing approvals, contract workflows
- Order management, invoicing, revenue recognition
- Renewals, subscriptions, partner sales, and analytics



To protect business continuity, we leverage:

Business Alignment: Cross-functional collaboration with Sales, Finance, Legal, and Ops to define transition strategy

Accelerators: Pre-built templates and tools (e.g., Talend, Snowflake) to reduce migration timelines

Phased Rollout: Regional, product-based, or user-specific launches to de-risk deployments

Training & Adoption: Custom training, sandbox simulations, and a change management strategy for rapid user onboarding

Data Reconciliation: Dual-system reporting during transition for complete trust

Hypercare & Feedback Loop: 2–4 week post-deployment support with daily standups

Governance: Weekly PMO checkpoints and executive steering to ensure resolution and control

RCA Migration Risks and Mitigation Strategies

Brillio proactively manages common RCA migration risks through early intervention, structured planning, and proven mitigation strategies:

Data Model Complexity - Legacy CPQ objects often don't align with RCA. We address this by conducting early data assessments, cleansing, and using Brillio's data transformation accelerators (e.g., Snowflake, Talend, FiveTran).

Process Misalignment - Existing business processes may differ from RCA flows. Brillio hosts in-depth workshops during the Define phase to co-design future-state models with stakeholders.

Catalog Migration Challenges - Complex product catalogs or CPQ misconfigurations can delay migration. Brillio mitigates this by rebuilding catalogs based on RCA best practices and launching a simplified MVP catalog.

Integration Overhead - Revenue Cloud requires updates across ERP, billing, and CLM systems. We involve integration teams early and



define APIs and data contracts during solution design.

Change Resistance - Functional teams may resist shifting to new tools and workflows. Brillio reduces friction through structured training and stakeholder engagement during the MVP phase.

Reporting Disruption - Legacy dashboards may not map to RCA's data model. We rebuild critical reports during MVP and enable new analytics aligned with RCA.

Phased Rollout Complexity - Multiple release cycles introduce coordination and testing challenges. Brillio addresses this with clear scoping, governance checkpoints, and release planning.

Limited Functionality & Roadmap Gaps - Gaps in features like Ramp Models, Promotions, or Debits are handled by prioritizing critical gaps and planning phased enhancements based on business impact.

What Does RCA Success Look Like?

Quote & Billing Accuracy: Reduced pricing errors, billing disputes, and quote automation issues

Customer Retention: Improved visibility into renewals and customer satisfaction

No Revenue Leakage: Data consistency across opportunity, quote, contract, billing, and rev rec

Single Platform: Unified insights across bookings, contracts, and revenue

606 Compliant System: Built-in alignment to ASC 606 and IFRS 15 standards

Time-to-Revenue: Faster recognition cycles driven by AI and data visibility

Brillio's Revenue Cloud Framework, Templates & Accelerators

We bring a comprehensive toolset to support RCA transformation:

Revenue Cloud Readiness Framework - Assess QTC landscape readiness for Revenue Cloud adoption



Scenario-Based Profiles & Templates - Role-based templates and flows for key business stakeholders

RC Migration Accelerator - Migrate from legacy systems with pre-defined mappings and automation

Lead-to-Revenue Assessment Framework - Fit-gap analysis and checklist-driven transformation scoping

Business Training & Adoption Templates - Train-the-trainer model and change enablement templates

Outcomes-Based Measurement Framework - KPI-driven framework to track ROI and transformation impact

Agentforce Integration for Revenue Cloud

Additionally, Brillio enhances RCA outcomes with Agentforce, embedding GenAI and automation directly into user workflows across Sales, Operations, Contracts, and Channel Management.

Sales Teams: Create bundled deals, apply optimized discounts without approvals

Contracts: Review redlines, generate clauses, approve workflows

Operations: Monitor order fulfillment, manage invoice approvals, apply payments

External Partners: Submit and track orders, review outstanding invoices and payments

This AI-powered augmentation reduces manual intervention, increases productivity, and gives each persona the insights they need, when they need them.

How RCA Migration Helps the Business

Brillio's RCA migration delivers measurable business value across key stakeholder groups:

Revenue Growth Enablement: Faster pricing model rollouts, bundled promotions, cross-sell/upsell with full usage visibility



Operational Efficiency: Unified platform reduces manual steps, shortens sales cycles, and lowers cost to serve

Compliance & Audit Readiness: Real-time traceability and compliance via centralized reporting and audit trails

Real-time AI Insights: Forecasting, pricing accuracy, and decision support via embedded analytics

Simplified Tech Stack: Reduced integration complexity and tech debt through pre-integrated Salesforce modules

Business Model Innovation: Scalable RCA architecture supports M&A, global expansion, and future monetization models





ABOUT BRILLIO

Brillio is a digital technology services company that drives AI-first engineering and design-led experiences for global enterprises. Born digital in 2014, its consulting-led services span Customer Experience, Data & AI, Product Engineering, and Digital Infrastructure. With an industry-leading NPS of 71, Brillio accelerates time to market through its proprietary BrillioOne.ai platform, powered by AI-ready talent with deep domain expertise.

Brillio is the official Digital Transformation Partner and the official Data and AI Services Provider of Atlassian Williams Racing. Brillio partners with leading technology providers including Microsoft, AWS, Google Cloud, Salesforce, Adobe, Databricks, and Snowflake and operates with 6,000+ “Brillians” across 15 global delivery centers. Consistently recognized as a Great Place to Work® since 2021, Brillio blends innovation, talent, and purpose to deliver measurable outcomes for clients and fulfilling careers for employees.



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