

Streamlining Complex Deal Approvals with Seamless Workflows

Case Study

Business Impact

20%

approved
profitable deals

52%

deal cycle time

40%

compliance errors

Problem Statement

A global SaaS leader faced significant inefficiencies in its deal approval process. Multi-tower, multi-region deals required inputs from Sales, Competency Leads, Delivery Managers, Finance, and C-level executives. This resulted in long email chains, static spreadsheets with broken formulas, and no audit trails for decision-making. Pricing inconsistencies frequently emerged during final reviews, causing delays and sometimes even deal losses. The leadership team lacked visibility into approval bottlenecks, making it impossible to track deal cycle health effectively.

Solution Overview

- Automatically routed deals to the correct set of stakeholders based on deal size and complexity.
- Systematically tagged approvals for Bid, Competency, Delivery, and Pricing lead to a reduction in manual tracking.
- Replaced scattered email threads with in-app comments, mobile notifications, and one-click approvals.
- Introduced real-time SLA tracking and bottleneck detection for ongoing deal cycles.
- Restricted deal views and edits by role and stage, maintaining confidentiality and compliance.
- Captured every change with timestamps to maintain complete approval traceability.
- Automatically generated quote-ready exports for CPQ systems to eliminate pricing inconsistencies.