



CASE STUDY

E2E Asset Data Migration from Zuora RevPro to Conga CPQ with **100% Automation of Manual Data Entry**

Insight

A leading American esignature giant used Zuora RevPro to manage its revenue processes in the US. However, it couldn't replicate the same model outside the US because Zuora RevPro didn't support new process modifications or business models. The client decided to switch to Conga CPQ.

Forsys joined hands FloData to help the client migrate asset data from Zuora RevPro to Conga CPQ, which included current service contracts, professional services projects, and associated deferred revenue details. As a result, the client has now eliminated 100% manual data entry and improved overall business operations & efficiencies.

Industry
Software Development

Revenue
\$5 M

Employees
7K+

Headquarters
California, US









Business Challenge

The client was looking for expertise required to migrate asset data from Zuora RevPro to Conga CPQ without disrupting ongoing business operations. It failed to adopt new processes and business models with Zuora RevPro.

Transformation Journey

Forsys along with FloData team, in collaboration with the client's executive team, created, defined, and finalized the migration strategy. They also identified the potential business risks, pressure-tested the resulting changes, and ensured that the source-to-target migration happened within the pre-decided timeline.




The key highlights of the approach to the solution are:

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|  Preparation of the environment to support 2 different tracks, i.e., one for the ERP track and a standalone track. |  Implementation of changes to inflight quote logic to exclude EMEA entities and partner marketplace opportunities. |
|  Asset data migration to the QA & UAT environments. |  Identification of the business and IT exceptions, and creation of reconciliation reports. |
|  Execution of QA cycle testing. |  Identification of fixed defects in the UAT cycle. |
|  Assessment of exceptions and identification of mechanisms for proactive exception processing. |  Production support for post-go-live issues. |

Impact

Within 19 weeks (including 2 weeks of support after the project went live), FloData migrated asset data to Conga CPQ.

Since the go-live, the client witnessed a series of benefits, comprising:

-  **Improved business operations & efficiencies**
-  **100% automation of manual data entry.**
-  **Complete adoption of Conga CPQ by the sales and finance teams.**

About the Client

The client is an American company that helps organizations connect and automate how they prepare, sign, act on and manage agreements by offering eSignature, the world's #1 way to sign electronically on practically any device, from almost anywhere, at any time.

Solution Components

Conga CPQ, [FloData](#), Zuora RevPro, JIRA