

REVENUE

THE END OF CPQ

The decision is not when to move.
It is what to build.

THE RECONCILIATION TAX

Why revenue teams spend more time
matching data than selling

CONTENTS



3

After CPQ

The decision is not when to move.
It is what to build.

5

The Reconciliation Tax

Why revenue teams spend more time
matching data than selling.



10

Avoiding the Cost of Getting Transformation Wrong

Delivery experience is the foundational
architecture of the agentic enterprise.

13

Quote-to-Cash Is Breaking

What the product-to-cash era actually
looks like in production.





The CPQ Sunset Is Not a Migration Problem. It Is a Revenue Architecture Decision.

Salesforce CPQ sales were discontinued in 2025. If your organization is currently running CPQ, you already know a transition is coming. The question is not whether to move. It is how to think about the move.

Most organizations are framing this as a migration project. How do we lift our current configuration, pricing, and quoting logic out of CPQ and into the new platform? How do we minimize disruption? How do we keep things running while we switch?

These are reasonable questions. But they are the wrong starting point.

Migration thinking preserves the old design. Architecture thinking improves it.

CPQ was built for direct sales. It handled quoting, pricing, and basic billing well in that context. But it was a managed package, installed on top of Salesforce. It had limited APIs. It supported a flat data model. And it was designed primarily for one selling motion: a rep configuring a deal.

The world has moved on. Organizations now sell through direct teams, partner channels, self-service ecommerce, and digital storefronts. They run hybrid pricing models that blend subscriptions, usage-based charges, and one-time fees. They need billing, revenue recognition, and compliance to be native, not bolted on.

If you migrate your CPQ setup as-is into a new platform, you carry the old constraints with you. The custom scripts. The fragmented product catalogs. The workarounds your team built over the years to compensate for what CPQ could not do natively. You end up with a new platform running an old architecture.

The opportunity is not to replicate. It is to rethink.

Agentforce Revenue Management, the successor to CPQ and Revenue Cloud, is built differently. It is native to the Salesforce platform. It is API-first and composable. It supports a unified product catalog, lifecycle management, multi-entity billing, and revenue recognition out of the box.

That means the migration conversation should start with business questions, not technical ones.

What revenue models do you need to support in the next two to three years? Which channels need to share consistent pricing logic? Where is your current process creating friction for sellers, partners, or customers? What manual work is your finance team doing that the platform could handle natively?

The answers to these questions determine what you should build on the new platform. Not what you had on the old one.

What a structured approach looks like

The organizations that get the most value from this transition treat it in three layers.

First, they assess what they have. Not just the technical configuration, but the business processes underneath. Product catalog structure. Pricing logic. Transaction history. Install base data. Quote-to-cash workflows. This audit reveals what is worth carrying forward and what is technical debt.

Second, they classify the migration effort. Some elements can be fully automated. Others need assisted migration with manual configuration. And some represent genuinely new capabilities that did not exist in CPQ. Organizations that understand this breakdown avoid the trap of trying to automate everything or rebuild everything from scratch.

Third, they align the migration to business value. The first phase should not be "move everything." It should be "move the highest-impact process first, prove value, then expand." A focused proof of value builds internal confidence and creates momentum for the broader rollout.

The window is now

CPQ is not disappearing overnight. But the organizations that start this process with an architecture mindset, rather than a migration mindset, will be in a stronger position. They will not just replace a tool. They will build a revenue foundation that supports the models, channels, and complexity they are heading toward.

For organizations currently weighing their options, the most useful first step is not a technical assessment. It is a conversation about what your revenue operations need to look like in two years, and whether your current foundation can get you there.





From Channel Chaos to Omnichannel Selling with Salesforce Agentforce Revenue Management

Customers today move fluidly between your website, a partner portal, and your direct sales team, and demand consistent pricing, accurate information, and a frictionless journey at every touchpoint. For most organizations, this unified experience remains an elusive goal. Their revenue operations are often fragmented across siloed systems, creating friction for customers and significant inefficiencies for the business.

Omnichannel selling is no longer just about offering multiple routes to market; it's about unifying the underlying operations that power them. The challenge is that traditional Configure, Price, Quote (CPQ) and billing systems were not designed for this level of complexity. They struggle to manage disparate channels, inconsistent data, and the sophisticated revenue models that

modern enterprises rely on. To truly succeed, businesses need a platform built from the ground up to connect every aspect of the product-to-cash lifecycle, from product definition and pricing to ordering, billing and final cash collection.

This guide explores how organizations can move beyond fragmented systems to build a truly connected omnichannel sales engine. We will examine the common pain points of disconnected revenue operations and show how Salesforce Agentforce Revenue Management provides a unified solution. Finally, we will outline how a strategic, advisory-led approach can help you modernize your revenue operations, eliminate channel conflict, and unlock scalable growth.

The Challenge: Fragmented Revenue Operations

For many enterprise leaders, the gap between their omnichannel vision and their operational reality is a source of constant frustration. Your teams work hard to serve customers, but they are often held back by a patchwork of disconnected systems and broken processes. This fragmentation manifests in several critical pain points that directly impact revenue, efficiency, and customer satisfaction.

Common challenges include:

- **Inconsistent Product and Pricing Data:** When product catalogs and pricing logic live in separate systems—like a CPQ tool for direct sales, an ecommerce platform for online orders, and a partner portal for channel sales—inconsistencies are inevitable. This leads to quoting errors, pricing disputes with partners, and a confusing experience for customers who see different offers depending on the channel.
- **Disconnected Systems and Data Silos:** A typical enterprise might juggle a dedicated CPQ solution, an ERP for billing, a separate ecommerce engine, and custom-built partner portals. Each system holds a piece of the customer story, but none has the complete picture. This forces teams into manual, time-consuming reconciliations between sales, finance, and operations just to close the books.
- **Poor Customer and Channel Visibility:** Without a unified view of customer interactions across all channels, it's nearly impossible to understand their full journey. Sales reps may not know a customer has already received a quote online, service agents can't see a partner's order history, and finance teams struggle to create accurate forecasts. This lack of visibility leads to missed cross-sell opportunities, redundant efforts, and a disjointed customer experience.
- **Inability to Scale New Monetization Models:** As businesses shift toward subscription, usage-based, and hybrid revenue models, the complexity multiplies. Legacy systems often lack the flexibility to manage these models consistently across direct, partner, and digital channels, hindering your ability to innovate and adapt to market demands.

These issues create a cycle of inefficiency that stifles growth. As one of our clients noted during a meeting, "Our legacy CPQ was great for direct sales, but it simply couldn't handle the complexity of our partner and ecommerce channels. We were spending more time reconciling data than selling..." Their experience highlights a fundamental truth: you cannot build a seamless front-end experience on a fragmented back-end foundation.

The Solution

To overcome the challenges of fragmentation, enterprises need a single, connected platform that can manage every route to market. Salesforce Agentforce Revenue Management was designed specifically for this purpose. Unlike legacy point solutions, it provides a unified product catalog, pricing engine, and order management system built on the core Salesforce platform. This enables you to deliver a consistent, end-to-end buying experience across all your selling motions. Salesforce Agentforce Revenue Management is more than just a replacement for CPQ and billing tools; it's a comprehensive revenue platform that supports:

- **All Selling Motions:** Whether your customers are engaging with a direct sales representative, a channel partner, or a self-service ecommerce site, Agentforce Revenue Management ensures they interact with the same product and pricing logic. This consistency eliminates channel conflict and builds trust.
- **Complex Revenue Models:** The platform is engineered to handle today's sophisticated monetization strategies, including subscriptions, usage-based billing, milestone-based contracts, and hybrid combinations. You can launch, manage, and scale these models across every channel from a single system.
- **A Unified Source of Truth:** By centralizing product, pricing, quoting, and order data on Salesforce, Agentforce Revenue Management creates one source of truth for your entire organization. Sales, finance, and operations teams all work from the same information, enabling accurate forecasting, streamlined reporting, and faster decision-making.



• **Intelligent Automation with AI:** Integrated with Salesforce's AI capabilities, Agentforce Revenue Management delivers intelligent recommendations and automation to your teams. It can suggest optimal product bundles, identify cross-sell and upsell opportunities, and automate complex billing and revenue recognition tasks, freeing your employees to focus on higher-value activities.

Because it's built on the Salesforce platform, Agentforce Revenue Management seamlessly connects with Sales Cloud, Service Cloud, and Experience Cloud, giving you a true 360-degree view of your customer. This holistic perspective is the key to unlocking true omnichannel selling and delivering the seamless experiences that modern buyers demand.

The Business Value of Unification

Moving to a unified revenue platform delivers tangible business value that extends far beyond IT simplification. By connecting your systems and processes, you can drive significant improvements in efficiency, visibility, and customer experience, creating a powerful engine for scalable growth.

The key business benefits include:

- **Consistency and Accuracy:** With one source of truth for product and pricing logic, you can guarantee that every quote, order, and invoice is accurate, regardless of the channel. This eliminates revenue leakage from incorrect discounts, prevents partner disputes, and ensures compliance with financial regulations.
- **Speed and Agility:** A unified platform dramatically accelerates the entire quote-to-cash lifecycle. Sales reps can generate complex quotes faster, orders are processed automatically, and billing is streamlined. This operational velocity allows your teams to close deals more quickly and respond to market changes with greater agility.
- **Complete Visibility:** When all revenue data lives in one place, you gain unprecedented visibility across the business. Leaders can access unified reporting and forecasting that combines direct, partner, and digital sales data. This allows for more strategic resource allocation, better performance management, and more accurate financial planning.
- **Simplified Scalability:** A single, connected platform makes it easier to scale your business. Adding new products, expanding into new markets,



or launching new sales channels can be done without bolting on new systems. This architectural simplicity reduces technical debt and lowers the total cost of ownership.

- **Superior Customer Experience:** Ultimately, the greatest value of unification is the impact it has on your customers. A seamless journey—from the first marketing touchpoint to the final invoice—builds trust and loyalty. When customers receive consistent pricing, accurate orders, and transparent billing, their satisfaction grows, leading to higher retention and greater lifetime value.

How OSF Makes It Happen

Successfully transitioning to a unified revenue platform requires more than just technology; it demands deep industry knowledge, proven methodologies, and a partner who understands both business strategy and technical execution. As a Salesforce-only consulting services leader, OSF Digital specializes in helping companies modernize their revenue operations with Salesforce Agentforce Revenue Management. Our approach is advisory-led and outcomes-focused, ensuring your investment delivers measurable results.

Our differentiators include:

- **Unmatched Salesforce Expertise:** Our deep focus on the Salesforce ecosystem is recognized across the industry. OSF is a member of multiple Salesforce Product Advisory Boards, including Agentforce Revenue Management, giving us early insight into product roadmaps and allowing us to influence development on behalf of our clients.
- **Proven Decision Frameworks:** We use our proprietary Agentforce Revenue Management Decision Framework to help you assess your business's readiness and identify the highest-value opportunities. This structured approach ensures that your implementation is aligned with clear business drivers from day one.
- **Real-World Implementation Experience:** We were among the first partners to execute advanced implementations of Revenue Cloud and its billing components for large enterprises. This hands-on experience has allowed us to develop proven playbooks and accelerators that reduce risk and accelerate time to value.
- **End-to-End Partnership:** OSF Digital provides a complete spectrum of services, from initial strategic advisory and implementation to ongoing support services. We act as an extension of your

team, providing continuous support to ensure your business.

- **Extending Value with AI:** Our expertise in agentic AI and data allows us to extend the value of Agentforce Revenue Management. We help you build a digital workforce that can handle routine tasks, surface critical insights, and empower your teams to operate at a higher level.

By combining advisory-led strategy with multi-cloud technical precision, we help you turn your omnichannel vision into a reality—faster and with less risk.

Turning Channel Chaos into One Growth Engine

The path to successful omnichannel selling is not paved with more tools and technologies. It is built on a unified foundation of connected systems, consistent data, and streamlined processes.

By breaking down the silos between your direct, partner, and digital channels, you can create a single, powerful growth engine that drives efficiency and delivers exceptional customer experiences.

Salesforce Agentforce Revenue Management provides the technology to make this possible. When combined with the strategic guidance and deep implementation expertise of a partner like OSF Digital, you can build a connected, scalable revenue platform that aligns your entire organization around the customer. The result is a more resilient, agile, and profitable business, ready to thrive in the modern economy.

Ready to unify your revenue operations?

Talk to an OSF expert and take our Agentforce Revenue Management Readiness Quiz to assess your organization's fit and identify key value drivers for your business.

Customer Success

A revenue platform built once, designed to scale across 13 brands.

A US-based software provider serving 3 million design and construction professionals across 160 countries had the kind of revenue stack that grows by accumulation. A CPQ tool for direct sales. A separate billing system. A commerce platform for the ecommerce channel. A partner portal with weak integration to all of it. Quote-to-cash leaked at every handoff. Renewals were manual. The buyer journey was invisible across channels.

As the largest business unit in a global parent group, they were also the first to attempt the

fix end to end. Whatever they built had to work for the twelve sister brands that would follow.

OSF replaced the fragmented stack with a single Revenue Cloud foundation connected to Sales Cloud, B2B Commerce, Data Cloud, Experience Cloud, and MuleSoft. One CPQ engine now serves direct sellers, the ecommerce storefront, and channel partners on the same product, pricing, and entitlement logic. The architecture is now the reference blueprint for the rest of the group.



Choosing the Right Transformation Partner for a Multi-Cloud, AI-Enabled Future

Most enterprise transformation programs do not stall because the technology fails. They stall because the operating model around the technology was never designed to hold it. Data sits in places where it cannot be activated. Integration layers are fragile. Governance is unclear. And when AI capabilities are layered on top, the cracks widen rather than close.

Choosing a partner used to be a question of which firm could implement a specific cloud. That question is no longer the right one. The decision now is which partner can help you make multiple clouds work as a single operating model, with data, workflows, and decisions that move cleanly across the business.

What to look for: Operational readiness, not feature checklists

Building an Agentic Enterprise requires more than enabling AI features. It requires a partner who can integrate, govern, orchestrate, and scale without introducing instability. Enterprise-grade automation does not operate inside a single cloud. It moves across customer journeys, supply chains, revenue processes, service operations, and marketing ecosystems. If one layer is weak, performance degrades. If integration is fragmented, processes stall. If governance is missing, risk increases.

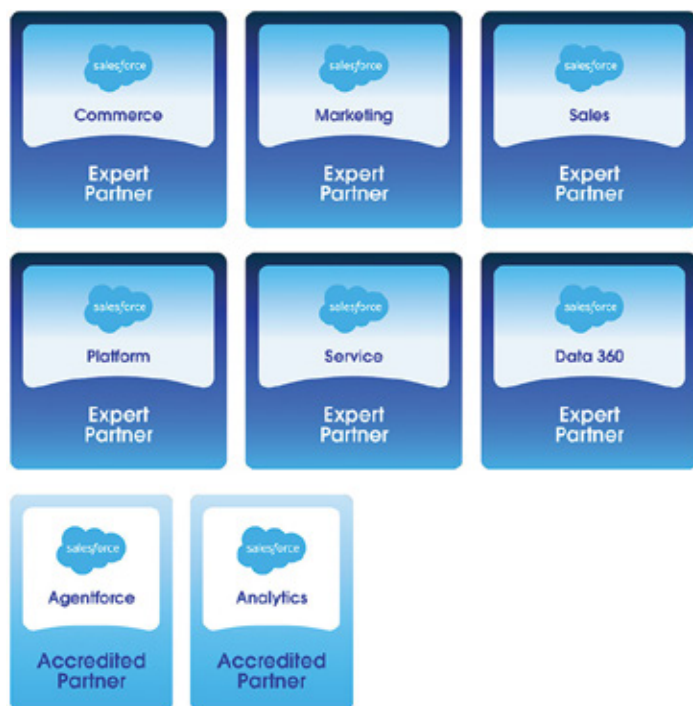
The right partner is the one who can tell you, before the work starts, where your data will hesitate, where your processes will stall, and where your governance will be tested. Automation

delivers value only when it operates inside structured environments, and structured environments are the result of deliberate design, not optimism.

Proven execution across the clouds that run your business

Cross-cloud delivery is where most partner conversations get vague. A partner can claim breadth on a website. The harder question is whether the same teams have stood up each of those clouds in production environments in your industry.

Products



Experience that prevents failure before it compounds

Enterprise transformation involves interconnected decisions spanning systems, teams, data, and processes. The cost of getting those decisions wrong is rarely visible the moment they are made. It shows up later as the AI initiative that cannot find clean data, the customer journey that breaks at a handoff, or the new capability that cannot be governed at scale.

This is the standard to which OSF Digital holds itself and where our credentials are relevant. We hold Expert-level Salesforce Competencies across Commerce, Marketing, Sales, Service, Platform, and Data 360, alongside Expert recognition in Consumer Goods, Retail, Manufacturing, and High Tech, with additional Accredited Competencies in Agentforce, Analytics, Financial Services, and Media. That coverage matters because the teams designing your commerce experience understand how it connects to service. The people configuring your service operation understand the data your marketing and sales teams rely on. The architects integrating your systems understand the industry workflows underneath them.

Industries



A partner with real depth across the architecture helps you avoid those costs before they compound. The right partner is not the one with the most awards on a website. It is the one whose people have done this work before, in your industry, across the clouds you actually use, and can tell you what will break before it breaks.

If you are evaluating partners for a multi-cloud or AI-enabled transformation, connect with OSF Digital to assess your current readiness and define a practical path forward.



Quote-to-Cash is Evolving: Welcome to Salesforce's Product-to-Cash Era

For years, “quote-to-cash” defined the standard process: configure, price, quote, and bill. But in today’s world of complex subscriptions, hybrid pricing, and real-time financial compliance, that model is showing cracks.

Enter **Salesforce Agentforce Revenue Management, the evolution of Revenue Cloud Advanced/Revenue Lifecycle Management**— a re-architected, AI-driven platform that doesn’t just patch the old process, but redefines it. Built on Salesforce’s Agentforce platform, revenue processes are no longer just automated, they are increasingly agent-assisted and policy-driven, reducing manual intervention across sales, finance and operations.

The new standard is **Product-to-Cash**: a lifecycle where product definition, selling, billing, payments, and revenue recognition are unified on one platform.

For RevOps, finance, and sales leaders, this isn’t a minor update. It’s the next era of revenue management.

Why Quote-to-Cash No Longer Fits Modern Revenue Models

The revenue lifecycle has evolved beyond the traditional quote-to-cash model. Businesses today need to move faster, support more complex product mixes, and unify the full customer and financial journey in a single platform. Business today also need systems that can reason, enforce policy and adapt in real time, not just execute static workflows. Agentforce Revenue Management is designed to deliver exactly that — a modern, AI-driven, end-to-end product-to-cash solution.

Unlike the legacy Salesforce CPQ + Billing package, which centered mainly on sales-driven quoting and downstream invoice generation, the new Agentforce Revenue Management platform expands scope and capability. It aligns product definition, selling models, ordering, billing, payments, and revenue recognition into one lifecycle — ensuring finance, sales, and operations run seamlessly together.

The Shift from Sales-Centric to Product and Policy-Centric Revenue

Quote-to-Cash focused primarily on the sales process: configure products, create a quote, generate an order, and hand off to billing. While valuable, it often left gaps when products changed rapidly, when finance needed better visibility, or when businesses launched usage-based and recurring offerings.

Product-to-Cash broadens this paradigm:

- **Product-first:** Every SKU, subscription, usage metric, and bundle is defined once in a centralized catalog. Pricing, discounting, and entitlements flow from this source of truth.
- **Lifecycle-centric:** Changes over time — amendments, renewals, suspensions, multi-year ramps — are treated as natural lifecycle events, not exceptions.
- **Finance-aligned:** Revenue recognition, subledger entries, and compliance schedules are generated natively, avoiding mismatches between sales data and financial reporting.
- **Customer-embedded:** Customers see accurate invoices, usage data, and balances directly in portals or agent-assisted channels, with payments seamlessly applied.
- **Policy-driven:** Pricing rules, revenue treatment, invoicing logic and compliance policies are enforced consistently by the platform, not re-implemented across teams or systems.

In short, Product-to-Cash connects the catalog → quote → order → invoice → payment → revenue recognition cycle into one unified system.

Inside Salesforce's New Revenue Engine

Agentforce Revenue Management combines a unified revenue data model with agent-assisted automation across the full product-to-cash lifecycle.

Unified Product Catalog

Products, bundles, pricing models, and usage rules are defined centrally. This eliminates redundancy between sales and finance systems.

Flexible Selling Models

Supports one-time, subscription, consumption/usage, and hybrid models natively — with proration, tiering, and ramping logic embedded.

Lifecycle Management

Handles amendments, renewals, suspensions, and partial cancellations as first-class processes rather than exceptions.

Advanced Billing Automation

Invoices can be generated on schedules, usage thresholds, or triggered events. Credit memos, adjustments, and collections are built in.

Payments & Collections

Integrates with payment gateways, manages retries and dunning, and applies payments at the line-item level.

Revenue Recognition & Subledger

Automatically generates recognition schedules (ASC 606/IFRS 15 compliant) and posts journal entries, acting as a subledger for finance teams.

Multi-Entity & Global Compliance

Supports multiple legal entities, tax jurisdictions, and currencies — critical for global organizations.

From CPQ+Billing to Agentforce Revenue Management: What’s Actually Different?

Legacy CPQ + Billing	Agentforce Revenue Management (formerly Revenue Cloud Advanced with Billing Advanced)
Primarily sales-driven: quotes and orders triggered downstream billing.	Product-first: centralized catalog drives quoting, orders, billing, and revenue.
CPQ and Billing were separate managed packages installed in Salesforce.	Delivered as an integrated evolved package with a unified data model.
Limited lifecycle handling — amendments and renewals often complex or custom.	Lifecycle-native — supports changes, suspensions, renewals, and ramps seamlessly.
Billing required heavy customization for usage or consumption models.	Usage and consumption billing are core, with rating and proration handled natively.
Revenue recognition often required additional integrations or workarounds.	Subledger and recognition schedules are embedded directly into Billing Advanced.
More fragmented between Sales Ops and Finance.	Unified view across Sales, Finance, and Operations with consistent data.
Largely workflow-driven automation.	Agent-assisted, policy-driven automation across quoting, billing and finance.

The shift is not just in naming — it represents a fundamental re-architecture. Agentforce Revenue Management is built on core to scale with modern revenue models, unify teams around a single product and financial source of truth, and reduce dependency on external systems or heavy customization.

Why It Matters: The Business Impact

- **Faster Time-to-Revenue:** Automated invoicing and recognition shorten the cycle from product launch to recognized revenue.
- **Operational Efficiency:** Sales, Finance, and Customer Success work from one platform, reducing errors and manual reconciliation.

- **Future-Proof Flexibility:** Native support for subscriptions, usage, and hybrid billing enables faster pivots to new business models.
- **Auditability & Compliance:** Built-in subledger and recognition rules ensure audit-ready financial data.
- **Customer Transparency:** Embedded invoicing, usage details, and payments improve trust and experience.
- **Reduced Revenue Leakage:** Agent-assisted enforcement of pricing, billing and revenue policies minimizes manual overrides and downstream corrections.

The Unified Revenue Lifecycle: A New Era for Sales, Finance, and Ops

The era of siloed quote-to-cash is giving way to holistic product-to-cash. Agentforce Revenue Management reflects this shift: moving from separate sales and billing functions toward an integrated lifecycle platform that unifies product definition, customer transactions, billing, and finance.

Organizations adopting this new model gain more than just efficiency, they gain the ability to launch modern revenue models quickly, ensure compliance, and provide customers with a seamless experience from purchase to payment.

Ready to Advance Your Revenue Model?

If you're rethinking how your organization manages revenue — or exploring a shift to subscription, usage-based, or hybrid models — now is the time to act. OSF Digital helps global businesses embrace Salesforce's new Product-to-Cash model by designing, implementing and scaling Agentforce Revenue Management for modern revenue operations. Talk to an OSF expert and see how you can accelerate your revenue transformation.



About OSF Digital

OSF Digital is a Salesforce-first consulting partner helping organizations turn AI, data, and trust into measurable business impact. With 20 years of hands-on Salesforce experience and deep multi-cloud expertise, OSF guides clients from strategy through implementation to managed services across financial services, retail, manufacturing, and more. Known for award-winning delivery and a distinctive partnership mindset, OSF acts as an expert extension of its clients' teams. With regional hubs across North America, LATAM, EMEA, and APAC, OSF combines global reach with personal, high-touch delivery.

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