Company Overview
Who Is Icon Cloud Consulting?

The Most Experienced ERP Implementation Partner by the Numbers

170+ Implementations on the Salesforce Platform

80+ Accounting and Billing Implementations

20 Employees Dedicated to Customer Success

100’s Of thousands of hours of Customer Efficiency and Productivity Gains
Icon’s Team of Experts

Our team has *unrivaled* expertise

- Over 25 years’ average IT and implementation experience
- Deep Domain proficiency in Quote to Cash, CPQ, Billing, Professional Services, Accounting, and Supply Chain Management
- Our consultants are located in every time zone in North America, strategically positioned to serve our customers wherever they may be
- Our consultants hold numerous Certifications from Salesforce, Project Management Institute, and other professional certifying associations.
Why Partner with Icon?

We are 100% focused on Salesforce Solutions as the core of our customers’ cloud

- Why? Because we believe that Salesforce is the leading solution for Lead to GL. Whether a customer’s solution is 100% on Salesforce or is integrated to other systems, Icon wants all users to adopt and love their new solution.

We solve complex challenges.

- We specialize in helping our customers future-proof their organization by tackling complex issues of scale now, whether measured by the number of transactions, products, users, companies, or countries.

Your Business Problems are our Business Problems.

- With over 170 implementations on Salesforce, we have experience solving the issues our customers are facing by leveraging best practices, the capabilities of the Salesforce Platform, and integration with other solutions.

We are Management Consultants

- We work hand in hand with customers across many industries adopting PSA, Billing, Accounting, and ERP. We understand how Financials on Salesforce adds the most value and how to ensure our clients realize this value quickly.
Some of our Recent Clients
End-to-End Implementation Support

**Scoping and Estimating**
- Map current business processes
- Align real-life scenarios with Salesforce capabilities
- Work hand-in-hand with key customer team members
- Determine critical success factors

**Implementation & Launch**
- Configure and Customize the Solution(s) to meet business needs
- Gather and import key business data
- Facilitate and Support User Acceptance Testing
- Deploy and go-live

**Support & Upgrade Assistance**
- Support Operations and Administration
- Provide health checks and ongoing health monitoring
- Product upgrade assistance
- Consult on best practices
- Support Third-party app integration
Icon utilizes an **agile** sprint-based approach where **observable** and **verifiable** feature functionality is iteratively delivered along a Project Roadmap.
Icon’s Salesforce Offerings

Our team of experts works hand-in-hand with your team to create a custom implementation solution on the Salesforce platform.

- Salesforce CRM
- Salesforce CPQ
- Salesforce Billing
- Salesforce Quote 2 Cash (CPQ + Billing)
- Salesforce Multi-Solution
Salesforce CRM

► **Business Scenario:** Organizations that wish to build strong relationships with their current customers and acquire new ones. To grow their business, they must manage leads better and convert them into closed/won opportunities. Sales information needs to be kept in one location that is easily accessible to the entire business.

► **Challenges Manifest As:**
  - Independent customer databases not updated or shared with the organization, resulting in stale or incorrect customer information.
  - Lost sales, no opportunity tracking and follow-up. No ability to forecast or assist with sales cycles.

► **The Icon Solution:** Implement automated Sales processes and tracking. Leverage the Salesforce platform to forecast and close deals faster. Build teams to support the sales process and improve communication using Chatter.
Salesforce CPQ

- **Business Scenario:** Organizations where the sales process is complex, there are a large number of products and services, or it is operating in many or varied markets.

- **Challenges Manifest As:**
  - Lost or incorrect sales due to manual or inflexible pricing or discounting
  - Products that should be sold together not being included on the sales order
  - Inability to get proper approvals in a timely fashion
  - Incorrect or generic terms and conditions on invoices
  - Poor renewal management, no opportunity tracking & follow-up

- **The Icon Solution:** Icon will implement an automated end-to-end sales process, integrating products, pricing, discounting, and approvals, with a focus on successful quote-to-cash delivery.
**Business Scenario:** Organizations that need to be able to bill for usage based items or Subscription orders. Organizations which need to have the ability to automate invoicing from the quote or contract, as well as accept payment for invoices within Salesforce.

**Challenges Manifest As:**
- Disjointed and manual billing processes
- Time wasted and errors created duplicating data entries between systems
- Manual revenue recognition and accounting journal creation
- No visibility for customer invoices by the Sales Team

**The Icon Solution:** Assist companies to transform their billing processes and apply best practices to future-proof their organization using Salesforce billing technologies
Salesforce Quote to Cash (Q2C)

► **Business Scenario:** Organizations looking for an end-to-end solution for quoting, billing, and payment acceptance.

► **Challenges Manifest As:**
  ► A combination of those seen by organizations in need of both a CPQ and a billing solution
  ► Lack of traceability
  ► Data in disparate systems
  ► Difficulty in accurate revenue recognition

► **The Icon Solution:** Icon will implement an automated end-to-end sales process, integrating products, pricing, discounting, and approvals, with a focus on successful quote-to-cash delivery, rev- rec, reporting, traceability, and visibility all in one single system.
Multi-Solution

► Business Scenario: Departments operating in silos often utilizing several out of date systems. Access to necessary data and reports requires extensive manual labor. Offline or on premise systems ready to be moved into the cloud.

► Challenges Manifest As:
  ► Limited visibility into end to end business operations
  ► Team collaboration is disjointed or near impossible
  ► Difficulties in reconciling and closing out accounting periods
  ► Manual data re-entry across multiple unrelated systems

► The Icon Solution: An expert point of view that focuses first on enabling the necessary end-to-end business processes, resulting in improved collaboration, timely financials reporting, efficiency gains and access to key data anytime, anywhere.
Icon’s FinancialForce Offerings

Our team of experts works hand-in-hand with your team to create a custom implementation solution for the following FinancialForce products:

- Professional Services Automation (PSA)
- Financial Management (FM)
- Supply Chain Management (SCM)
- Services Resource Planning (SRP)
- FinancialForce Multi-Solution
Professional Services Automation (PSA)

► **Business Scenario**: Organizations struggle to track project health, gain visibility across business units, and predict future resource demands.

► **Challenges Manifest As**:
  ▶ Manual capacity planning
  ▶ After-the-fact project profitability analysis
  ▶ Inability to forecast revenue or margin
  ▶ Poor Time & Expense compliance
  ▶ Unmanaged Vendors
  ▶ Large variance in utilization

► **The Icon Solution**: Icon works to map FinancialForce technology to existing professional services processes and helps teams adopt best practices. End-to-end visibility and compliant data allow customers to make strategic decisions and improve utilization and profitability.
Financial Management (FM)

- **Business Scenario:** Organizations that have outgrown their current accounting solution, whether through acquisition, adding a new line of business, or opening an office in a new country.

- **Challenges Manifest As:**
  - Disjointed accounting processes
  - Multiple sets of books; leads to time wasted duplicating data between ledgers
  - Manual consolidation for Multi-Company/ Multi-Currency
  - Awkward Inter-Company Transactions & eliminations

- **The Icon Solution:** Assist companies to transform their accounting processes, apply best practices, and future-proof their organization using FinancialForce technologies. Enable customers to leverage FFA as the foundation of their Salesforce ERP solution.
Supply Chain & Procurement (SCM)

► **Business Scenario:** Organizations such as OEM’s, VAR’s and Distributors with tangible products who need to effectively track inventory, manage orders, and send quotes in one simplified system. Organizations who need to connect procure-to-pay processes with quoting.

► **Challenges Manifest As:**
  - Manual order tracking
  - Inconsistent data related to inventory availability and location
  - Errors in billing and accounting procedures
  - Lost sales due to manual processes

► **The Icon Solution:** Align the customer’s unique processes with FinancialForce’s platform to give the business the data and insight it needs to better serve the end customer.
Services Resource Planning (SRP)

- **Business Scenario:** Professional Services Organizations struggling to report across business segments, using separate systems for CRM, project delivery, time tracking, and accounting.

- **Challenges Manifest As:**
  - Disconnected sales to delivery to finance
  - Inability to report on key business metrics
  - Clumsy integrations don't support real world scenarios

- **The Icon Solution:** Develop a process to bring critical data into a single system enabling a seamless handoff from point of sale through project delivery, invoicing, and reconciliation.
Icon is dedicated to our customers long-term. To ensure our clients continue to get the most out of their investment for years to come, Icon provides many value-added services for our customers to remain best in class.

- Custom Products
- Custom Salesforce Development
- Third Party Integrations
- Training
- Ongoing Support
Deployment as a Service

► **Business Scenario:** Deploying data between various Salesforce orgs is manual and fraught with errors. A typical org supports over 100 metadata types, and can include custom workflows, Visualforce pages, Apex triggers, and custom objects, and it is constantly evolving.

► **Challenges Manifest As:**
  ► High rate of errors and rework during deployment
  ► Low customer satisfaction during and after go-live
  ► High cost of deployment
  ► Manual documentation and preparation process

► **The Icon Solution:** Deployment as a Service reduces errors over other deployment methods (e.g. change sets) by 90% and reduces deployment effort, cost, and schedule by 75%.
Custom Salesforce Development

- **Business Scenario:** Organizations that are using Salesforce, but the out-of-the-box functionally does not fully support their business needs.

- **Challenges Manifest As:**
  - Standard objects or functions don’t support required features or behaviors
  - Poor user adoption due to too many clicks
  - Repetitive actions need to be automated

- **The Icon Solution:** Icon automates repeatable activities to increase speed, and creates new features to support your unique business processes to fully harness the power of Salesforce technology
Third Party Software Integrations

- **Business Scenario**: Adopting Salesforce and FinancialForce solutions sometimes means that existing supporting systems need to be integrated to function seamlessly.

- **External Solutions with Standard Icon Integrations**:  
  - Concur  
  - Expensify  
  - QuickBooks  
  - NetSuite  
  - Intacct  
  - Dynamics/ Great Plains
Icon offers hands-on team training in the following areas:

- Introduction to PSA
- PSA Administration
- FinancialForce PSA for Developers and Administrators

In addition, the user training for each solution comes with a comprehensive guidebook for do-it-yourself troubleshooting and management

- PSA User Training and Guidebook
- FFA User Training and Guidebook
- SCM User Training and Guidebook

Empower your team to take control of their org.
Icon’s Support Services

- Post Deployment Implementation Support (Time or Budget Based)
- Product Upgrade Support
- Health Check and Health Monitor
- Operations Staffing
- Virtual System Admin Staffing
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