



# Monograph Accelerates Quoting With Subskribe's Intuitive CPQ

Discover how Monograph boosted deal velocity,  
cut quote-to-signature time, and went live in just 30 days



## COMPANY

**Monograph**

INDUSTRY

**Architecture Software**



## GOALS

- Transition from a manual quoting process to a scalable, automated process
- Provide a visually appealing, intuitive user experience for sales reps to quote independently and reduce onboarding times
- Handle advanced, enterprise deal structures like multi-year ramps
- Create professional, design-forward order forms
- Seamlessly integrate with Salesforce and DocuSign



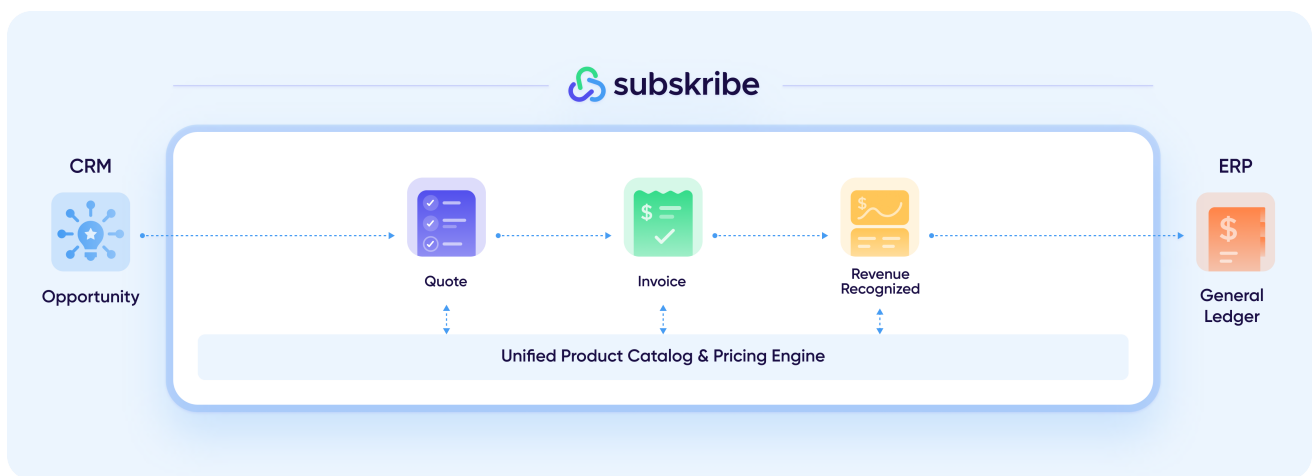
## RESULTS

- Fully implemented and live within 30 days
- Streamlined quote generation and approval workflows, boosting deal velocity and cutting quote-to-signature time
- Provided easy-to-use UI for sales reps, accelerating quote creation and minimizing training needs
- Reduced cumbersome, manual work for revenue operations, finance, and sales teams

## Background

Monograph is a firm performance management platform for architecture and engineering practices. Firms use Monograph to make quick and confident decisions about budgeting and resources to drive their practices forward.

As Manager of Revenue Operations at Monograph, Matt Woodfin oversees all of the company's GTM operations. He was looking to implement a robust quoting system for the company, which until recently had relied primarily on customers purchasing directly using a credit card on the website. However, as the business started selling to larger enterprises, they realized quickly that they needed a formal quoting process and a system that could handle complex contracts. "We needed a platform that could scale with us to accommodate more complex deal structures and customer procurement processes," said Woodfin.



## Manual Quoting Couldn't Scale and Didn't Reflect Monograph's Design-forward Customers

With no formal quoting process in place, much of the sales and closing process was time-consuming and manual. While most deals were closed with a customer entering in their credit card information, this process was becoming more cumbersome as the team started selling to larger customers. "As we started moving upstream and encountering more formal procurement processes, we started to become handcuffed as we had to actually get the customer on the phone to make sure that they entered their credit card information," added Woodfin.

And as the team started to build quotes by hand for more complex deals, it was clear that the output was not reflecting the professionalism and design-forward thinking of Monograph's customer base. "We are a design-driven firm," explained Woodfin. "And just visually, our order forms were not up to par."

**Ramp Quote**

1. Product A Total Cost \$276,000.00

Charges	Q-ty	Price	Discount	Total
Year 1			10% <span>Apply discount</span>	
Year 2			15% <span>Apply discount</span>	
Year 3			20% <span>Apply discount</span>	

**Approval Workflow** Active

Name: Order Discount >= 25% Description: Order Discount >= 25%

If order + Add rule

TCV is greater or equal to 50000

and any line item has + Add rule

Discount % is greater or equal to 25%

**New Charge**

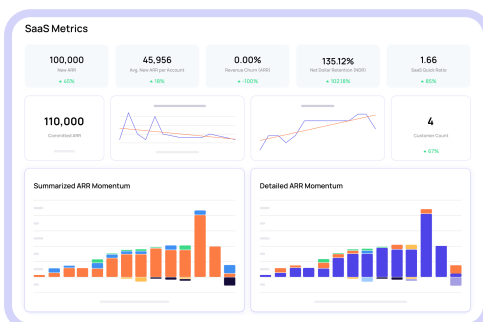
Charge Type: Usage Charge Name: Database Usage

Charge Model: Per Unit

Unit Price: \$ 0.005

☒ Drawdown charge

Recurring  
One Time  
**Usage**  
Prepaid  
Percentage Of



Woodfin also described a process that had too many single points of failure. When it came to approvals, much of this logic had to be built in their Salesforce CRM instance, but it wasn't adaptable. "It created bottlenecks where I was the only Salesforce resource, so if something needed to be changed, it would have to go through me," he said.

The process of sending a quote out to a prospect also became troublesome, particularly at the close of the month or quarter. Woodfin or Monograph's Chief of Staff, Evan Loh, would need to generate the order form in Salesforce, manually pull it out and package it in DocuSign, and then send it to the customer.

"It was very labor intensive and became a sticking point as we got to the end of a month or quarter," said Woodfin. "I'm on the East Coast, along with most of our sales team, but Evan is in Vancouver. Coordinating who was sending what and when introduced unnecessary risk and delays to getting orders out for signature."

## A Modern Platform With an Easy, Intuitive UI and the Potential to Scale Quickly

When it came to evaluating CPQ platforms, Woodfin had just come off of a recent implementation with another vendor at a prior company, so he had a clear idea of what he wanted and didn't want. He knew he needed a platform that would make his life easier, particularly because he didn't have a huge operations team to lean on — it was just him for the time being.

Once he saw Subskribe's modern interface and how easy it was to manage, he knew he had found just what he needed.

- **A visually appealing, easy-to-use interface** for sales reps to quickly adopt and feel comfortable building quotes on their own. "I don't have to teach sales reps how to use it," explained Woodfin. "Our reps can have full autonomy, while operating within predetermined approval thresholds."



## KEY BENEFITS OF USING SUBSKRIBE

---

- Be up and running in a matter of days, not months or quarters.
- Intuitive and easy to use, with little to no training.
- Create complex enterprise quotes in under a minute.
- Build beautiful, on-brand proposals with customizable templates.
- Eliminate the unnecessary costs of maintaining a CPQ system. No workarounds, no custom integrations, no maintaining multiple catalogs — Subskribe just works.

- **Support for advanced deals** to make it easier for reps to build contracts that customers want, like multi-year ramps with tiered-up or tiered-down discounts.
- **Enterprise-grade capabilities** to support the company's move upmarket.
- **Beautifully designed quotes** that could be proudly presented to the company's design-focused customer base.
- **Strong integration with an e-sign platform** to reduce manual work and facilitate a seamless signing process. "I simply click a button and the quote is packaged up and sent for signature," said Woodfin. "It's exactly what I was looking for."
- **A true partnership with a disruptive, fast-moving vendor** that could support opportunities to scale, grow, and integrate the tool closely with the product.

"I've always had more success working with innovative startups," Woodfin said. "Having access to the founders, professional services team, and the engineering team throughout the evaluation, implementation, and roll-out process is just something you don't get with larger vendors in the space."

## Fast and Easy-to-Use Platform Accelerates Deal Velocity, Goes Live in Just 30 Days

Monograph's quoting engine is now fully powered by Subskribe, eliminating the need for a cumbersome manual quoting process with multiple points of failure. Sales reps can independently create professional-looking, enterprise-ready quotes without needing to rely on Woodfin or Loh and without having to make a call to the customer to input their credit card information. Order forms can be sent out for signature in seconds, and Woodfin spends minimal time training reps on Subskribe.

"The ease of use really exceeded my expectations," said Woodfin. "It's dead simple; I can give it to anyone on the team, and they're able to navigate the platform in just a few minutes. From the approval workflows to getting it pushed to DocuSign in just a few clicks — it just works."

## QUOTE

---

Subskribe's ease of use really exceeded my expectations. We've been able to increase deal velocity in an already highly transactional space.

### **Matt Woodfin**

Manager, Revenue Operations



According to Woodfin, the speed with which reps can build quotes has contributed to shorter deal cycles. "We've been able to increase deal velocity in an already highly transactional space."

And getting customers to sign order forms has never been easier. "The reduction in time in terms of quote to signature has been amazing. We recently approved a quote at 10:03 AM, and at 10:04 AM, it was already signed and returned."

Woodfin and team are already envisioning ways to further integrate Subskribe into Monograph's revenue operations, including being able to incorporate Subskribe directly into their billing process. "One of our long-term goals is to hook Subskribe's open API into our application to automatically provision access and entitlements once an order form is executed," said Woodfin.

As Woodfin continues to bring more reps onto the platform, he said working with the Subskribe team has been a delight, and he was particularly impressed with the speed and ease of the implementation process, going from signature to go-live in just a month's time.

"It was a treat working with the Subskribe implementation team," explained Woodfin. "We opened up user acceptance testing (UAT) in just a few weeks, where I anticipated a learning curve of at least a few weeks from my reps. Instead, we blew right past that and rolled it out in short order."



Schedule your demo to [get started.](#)