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eBook

# MOVE FROM CPQ TO ARM WITH UP TO 50% LESS BUILD EFFORT

Decide with evidence, migrate the logic behind your prices and prove parity before cutover



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# AT A GLANCE

Five things to know before you plan a move from Salesforce CPQ to Agentforce Revenue Management.

**01** Salesforce CPQ has been end-of-sale since March 2025, yet decisions to move to ARM keep stalling on six recurring roadblocks.

**02** The biggest risk is carrying years of hidden customization into a platform built on a different data model.

**03** Brillio's ontology-led path analyzes the CPQ org first, converts it with our Migration Accelerator, then re-factors data for ARM.

**04** One ontology pays back at every step, with up to 50% less build effort and proven price parity before cutover.

**05** Organizations land on a revenue platform ready for Agentforce agents, with sales, finance and product sharing one commercial vocabulary.

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# WHY CPQ-TO-ARM DECISIONS KEEP STALLING

Salesforce stopped selling CPQ in March 2025 and now puts its innovation into Agentforce Revenue Management (ARM). Every year on CPQ means paying to maintain a platform that will not receive the AI and agentic capabilities now arriving on ARM.

Most organizations know they need to move. What holds them back is not the decision but the migration itself: in our conversations, the same six roadblocks come up. Each one can be solved, but left alone, each makes the next harder to clear.

### 01 Nobody has a full picture of the org

Most CPQ orgs are the product of years of customization. Commercial logic sits in product rules, price rules and QCP scripts, often under names only a few people still recognize, and in the most complex implementations customization reaches 40-70%. Without a clear inventory, every later decision rests on guesswork.

### 02 A lift-and-shift moves the workarounds, not the logic

The obvious response is to copy the org across, field by field. But ARM runs on the core Salesforce platform rather than as a managed package, and its data model is different: SBQQ objects do not map one-to-one and need re-engineering. A lift-and-shift simply carries years of workarounds into the new platform.

### 03 The business case is hard to prove

That uncertainty makes the numbers hard to defend. Owning CPQ is already expensive, with 20-30% of the implementation cost spent on upkeep every year and a five-year TCO of 3-4x the initial implementation. Yet the payoff of moving stays unclear, while disruption, change management and training add to the bill.

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### 04 The migration itself takes too long

Time is another component of the problem. A conventional CPQ-to-ARM program runs a full year, sometimes 16 months, with the quoting process frozen or duplicated throughout.

### 05 Nobody will sign off on unproven prices

Pricing is where revenue leaks, so it is where the risk feels sharpest. Finance and sales will not approve cutover without proof of 100% price and quote parity, and moving data from CPQ objects to ARM objects adds complexity at exactly that point.

### 06 The agent-ready future stays out of reach

ARM is meant to be the foundation for agentic, AI-led quoting. Designing for that on top of today's CPQ is hard, and ungoverned data gives agents poor context. Organizations can see the destination, but not a credible path to it.

## What we are solving for

These roadblocks share a root cause. Migrations treat CPQ as metadata to be moved, when the real asset is the commercial meaning inside it. We built our approach to help organizations decide with evidence, migrate the meaning and not just the metadata, prove price parity before cutover and land on a platform ready for autonomous agents.

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# HOW OUR ONTOLOGY-LED PATH TO ARM WORKS

Brillio helps organizations choose the right future state, prove the business case and then build it faster. Our first path is a direct migration to ARM, anchored in an ontology of the existing CPQ org and delivered with our ontology-led ARM migration accelerator. Where it fits better, we also guide clients toward a pure technical upgrade without the ontology. The migration runs in three steps, inside the client's existing org: ARM is enabled alongside Steelbrick CPQ in the same org rather than in a new one.

1

## ANALYZE

Map what the CPQ org really holds

We start with an as-is analysis of the CPQ org and a health report that shows whether it is ready to migrate to ARM. We analyze technical debt, customization and existing data, then use the findings to guide a clear decision: continue on this path, or re-imagine the process first.

OUTPUT

**An ARM fit-gap analysis, a customization report and the quick wins to fix**

2

## CONVERT

Migrate CPQ to ARM at speed

Our Migration Accelerator reads the CPQ org, then maps and transforms its configuration into ARM. We apply the ontology-updated design to deliver quick wins early, building selected user stories through Brillio's ADLC product.

OUTPUT

**A validated ARM org, ready for data re-factoring**

3

## RE-FACTOR DATA

Adopt the ARM data model

We migrate and re-factor master data, then validate and reconcile it, with business reviews to confirm accuracy. Steelbrick CPQ components are de-activated, and integrations are retrofitted with a human in the loop through our forward deployed engineers (FDEs).

OUTPUT

**A validated ARM org, ready for quoting**

**Across all three steps:** our FDEs support the re-factoring of active and historical transactional data, along with the integration changes the move requires.

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# WHAT ORGANIZATIONS GAIN FROM AN ONTOLOGY-LED MOVE

Brillio builds the ontology, a single model of the org's commercial logic, once at the start, and every later step reuses it instead of starting over.

This is where the gains come from: up to 40% less build effort, a faster route to the first ARM quote and proven price parity before cutover. Four differentiators set our approach apart.

## CHEAPER

### Lower cost to migrate and to run

We rationalize first, so fewer rules and SKUs are rebuilt and maintained. Custom CPQ code is replaced with declarative pricing procedures, and the model is reused for future catalog changes instead of starting discovery again.

**35%**
fewer rules carried into ARM after rationalization

**40%**
less migration build effort

**30%**
lower annual admin and maintenance effort

## FASTER

### Shorter migration, quicker quotes and launches

ARM configuration is derived from the model, not hand-built from scratch. Business owners sign off once, on the model, rather than screen by screen, and new offers are added to the model and flow straight into ARM.

**20-24**
weeks from kickoff to the first ARM quote

**50%**
shorter quote cycle time

**Under 5**
days to launch a new offer or price change

## BETTER

### A revenue platform ready for agents

Quote-to-cash runs on core platform objects, end to end. Governed, well-defined data gives Agentforce agents reliable context, and sales, finance and product share one commercial vocabulary.

**40%**
of quotes with no manual intervention

**60%**
fewer approval escalations

**5+**
manual handoffs removed from quote to cash

## ACCURATE

### Prices clients can trust on day one

Every ARM element traces back to an approved source rule. Parallel-run pricing proves parity before anyone switches, and defects are caught in the model before they are built.

**100%**
of migrated rules traced to an approved source

**100%**
price parity on parallel-run quotes

**70%**
fewer quote and invoice errors when integrated with the billing system

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## About Brillio

Brillio is The Enterprise AI Accelerator helping Fortune 1000 companies move from AI ambition to scaled impact, faster. Powered by our AI accelerator platform – Agentic Data and Application Management (ADAM), Brillio is one of the fastest-growing digital technology service providers, delivering transformation across five core workstreams: business-led transformation, customer experience transformation, AI and data engineering, digital engineering, and infrastructure engineering.

With 14 delivery locations across North America, Europe, and Asia and a team of over 6,000 customer-obsessed professionals, Brillio combines deep industry expertise, modern engineering, and accelerators to deliver measurable outcomes. Headquartered in Dallas, Texas, Brillio serves clients globally with a commitment to speed, scale, and measurable impact.

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