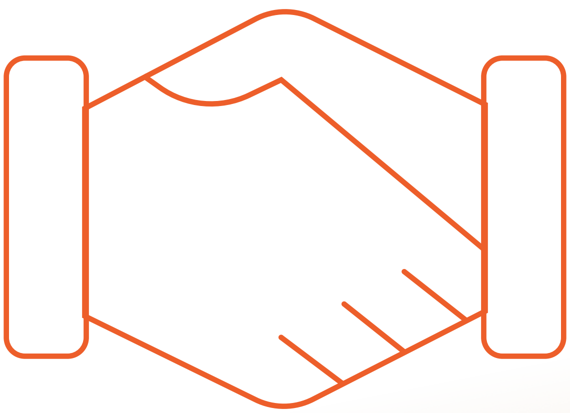
# What is a Deal Desk

## and Why Do You Need One?



ateko
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## Introduction - What is a Deal Desk?

As organizations scale in both size and complexity, Deal Desks tend to naturally evolve as a crucial component of the Sales, Legal and Finance processes. Deal Desks serve as a centralized hub for managing and reviewing complex deals.

Put simply, the Deak Desk is responsible for ensuring that all sales meet the organization's criteria for profitability, risk, and strategic alignment, while also facilitating communication and collaboration between Sales, Legal and Finance teams. While they can sometimes be a source of pain and complaints from Sales, the Deal Desk balances the desire of the organization to close sales, while ensuring that the contracts make financial sense, are legally sound, and do not expose the organization to unnecessary or unwise risk. In smaller organizations, Deal Desk might be as simple as a Sales Operations team member manually ensuring that Opportunities are not discounted over a certain percentage and confirming all contracts have been reviewed by Legal. In more mature scenarios, it can involve automation and approvals triggered by discount rates, size of deal, custom paper, and changes in payment terms.

In this resource, we will explore the best practices for setting up and operating a Deal Desk in Salesforce, as well as common challenges and solutions for Sales Operations team members establishing or overseeing Deal Desks.

By following the best practices outlined, organizations can streamline their deal review process, improve collaboration and communication between teams, and ultimately increase revenue and profitability. The end goal of Deal Desk is not to slow or add to friction to the Sales process, it is to ensure that in the pursuit of closing sales in the short term, concessions have not been made that will harm the organization in the long term.

Consider the Deal Desk as a safety net for companies. It provides an extra layer of oversight and review to ensure that deals are being evaluated properly and any potential issues or risks are identified and addressed before a deal is approved. This not only helps protect the company from potential losses or legal issues, but it also helps build trust with customers and partners by ensuring that deals are fair and mutually beneficial.

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## Why are Deal Desks Required?

Sales' job is to make sales. Legal's job is to minimize exposure to risk. Finance's job is to ensure money comes in the door when it is needed. Deal Desk is the intersection of these interests. However, what is often missed (and an underlying premise that needs to be kept in mind) is that most Sales people do not have a background in Legal or Finance. They should not and cannot be expected to fully understand or keep those complexities top of mind at all times. The Deal Desk ensures that there are checks and balances in place to keep deals in alignment with the long term needs and goals of the organization, and that the right people are in place to make this happen.

## When you may need a Deal Desk

Not every organization needs a Deal Desk. If you're a small organization, it may be overkill. However, if one or more of the following items are occuring, then it is time to start planning for one:

1. Your sales are complex and require NDAs, MSAs, Contracts and multiple pieces of paperwork. Particularly if a portion of clients will require you use their contracts (as opposed to standardized button click acceptances in product). Inherently, this is part of Enterprise sales.
2. You have International deals, which creates complexity for risk, compliance and legal considerations like GDPR, currency exchanges and other factors come into play.
3. Your product and pricing is complex and Opportunities require careful review to ensure that they are not overly discounted, but also that what is being sold works together. To use a Salesforce example, to prevent a client from purchasing CPQ, without having the prerequisite of Sales Cloud in place.
4. You have SLAs with clients that are bespoke at a certain level and need to be reviewed very carefully.

## Who Owns Deal Desk?

Our experience at Ateko is that Deal Desks are best owned by Sales or Revenue Operations. For the purposes of this resource, we'll refer to Sales Ops, but either can work. Sales Ops provide a neutral point of view, they tend to be focused on that combination of process and expediting Sales, they tend to be technical (they can iterate on what is built) and the best ones want to measure, improve, measure, improve. These teams are inclined to look for ways to streamline the process over time, rather than making it more onerous.

## Where's the Deal Desk App?

Interestingly enough, there isn't a native "Deal-Desk-in-a-box" feature in Salesforce. There are aspects of CPQ, standard Approval process features and other native parts of Sales Cloud that can combine to make up how a Deal Desk is built. Unlike other common Sales Cloud requirements like digital signatures (Adobe and DocuSign), complex routing and matching (LeanData) and enrichment (Clearbit and ZoomInfo), there isn't an obvious, dominant AppExchange solution that provides an easily configurable Deal Desk. There are also integrations (like Ironclad) that can tie in more of the legal/document portions - but again, there is no single well-recognized, industry standard full service solution. This means that Deal Desks have to be configured - and we'll cover how to do that in the Salesforce Configuration section of the document.

## So You Need a Deal Desk, Now What?

### Identify Stakeholders

The first step in successfully setting up a Deal Desk in Salesforce is to identify stakeholders and gather requirements. This will almost always include representatives from Sales, Finance, Legal, and sometimes include other relevant departments. Depending on the size of the organization, there may be teams like Risk and Compliance that are related to Legal, but sit independently. This is particularly true for organizations that are regulated or sell into regulated markets. It is important to ensure that the stakeholder team has not only the necessary expertise and authority to make decisions and drive the Deal Desk's success, but that they understand the prevailing goal: **close sales efficiently while minimizing risk**.

### Assign Scope & Responsibilities

Once stakeholders are identified, the next step is defining the Deal Desk's scope and responsibilities. This involves determining which types of deals will be reviewed by the Deal Desk, what criteria and thresholds will be used to evaluate deals, and what the approval workflows and escalation paths will be. In the vein of streamlining sales and not overwhelming the Deal Desk during hot periods like End of Quarter (EOQ), a process that defaults to “no Deal Desk review” for Opportunities within certain parameters serves the dual purpose of reducing the number of deals requiring review and incenting Sales to avoid “snowflake deals” and custom terms.

Three keys to gaining Sales buy-in on the Deal Desk and reducing congestion are:

- Pre-emptive approvals
- Avoiding a Single Stream Deal Desk process
- Leadership and Individual Sales Team member Dashboards to highlight exactly where Deals sit in the approval process, for how long, and with which parties

Another area to be mindful of is ensuring that Sales Ops does not start to become Legal Ops. It is not the role of Sales Operations to interpret legal, parse through it or understand it. When Deal Desk roles and responsibilities are delineated, the organization needs to ensure that Legal’s obligations are clear, but also revisited over time. It is often the case that Legal becomes the pinch point in Deal Desk review for sales, and Sales Ops will naturally feel the urge to step in to help. But in most cases, they do not have the background and expertise to do this, they are also an under-resourced group and leaning on them for this just means other aspects of Sales are going to suffer.

Related to this, success of Deal Desk is dependent on the willingness of Legal to adhere to the standardized process, which is likely built in Salesforce. While they have a large say and hammer to swing in terms of what is/isn't approved and what needs to be reviewed, their feedback on the technology behind the process should carry much less weight. Too often we see cases where the Deal Desk process becomes inefficient and loses visibility because Legal will insist on being emailed documents or approvals and responding by email with approvals. Quite simply, this should not be permitted. While likely well-intentioned, it violates some fundamental characteristics of a successful Deal Desk solution, which include measurement, visibility and automation.

## Define Criteria for Pre-emptive Approvals

One common error that organizations make is constructing an approval process that is only triggered in the final or near final Opportunity stage. In this situation, details like an outsized discount or custom MSA, that have been known in Salesforce for months, only suddenly begin being routed for approval in the final stage of the deal, slowing sales, causing congestion and quarter end and in general putting sales at risk.

Instead, Sales team members should be warned pre-emptively if an action is going to trigger a Deal Desk review. For example, when updating a discount from 15 to 20%, they may receive a notification "*Increasing the discount beyond 15% will trigger a Deal Desk review - are you sure you want to continue*". This disincentivizes the representatives from crafting snowflake deals and heavy discounting, because it introduces friction and pain for doing so. However, if they do choose to proceed, ideally the approval process is triggered at that moment, as opposed to later in the sale cycle. This not only reduces that last minute pressure for any reviewers, but also makes it so the sale is not at a "fait accompli" moment and then embarrassingly has to be walked back by the Salesperson. In the Salesforce Configuration section of this document we will review how Product Rules can be leveraged to flag snowflake deals and Price Rules be leveraged to trigger immediate approvals.

## Avoid Single Streaming Deal Desk processes

When Deal Desk automation is first set up in Salesforce, many companies instinctively create a single stream process, where every Opportunity that triggers a Deal Desk review requires all the same reviewer approval (Legal, CRO, Compliance etc). This type of single streaming is lazy and not only delays sales, but also wastes the time of some of your most expensive and valuable team members. It is rare that a CRO or legal team member has any spare capacity, so having them review every Opportunity may waste time and slow other Opportunities in the backlog that may actually require their attention.

Take for example, an Opportunity where there is only one aspect of the deal (say a discount) that requires the CRO's approval. It makes no sense, and wastes significant resources, to tie up the time of multiple team members in a single stream process.

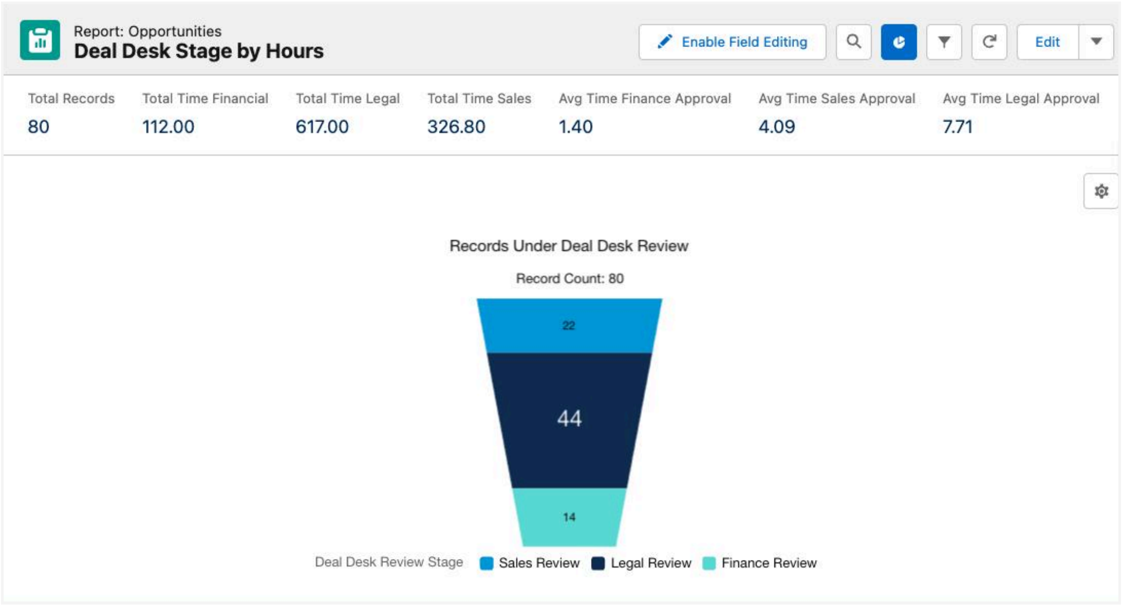
In the Salesforce Configuration section of this document we will review how Advanced Approvals and Smart Approvals can be leveraged to ensure approval are not re-done and routed to the correct approver for the situation.

## Encourage Real Time Reporting

Too often organizations have complaints about Deal Desk slowing or causing sales to be lost, but this is rarely rooted in fact.

If you have a Deal Desk in place, there should be reporting available to Leadership (and actually looked at by Leadership), but also reviewed by Sales Operations weekly. Reporting should show:

- What percent of Opportunities (and how many in total) are at each stage in the Deal Desk process
- How many hours/working days the existing Opportunities have been in each stage
- Trends showing where Opportunities spend the most time waiting at each stage. This is the most important because here is where the opportunity lay for Sales Operations to flag pinch points and raise with leadership where additional resourcing or changes in the process will have the most impact




*Sample report displaying Deal Desk Review Stages and metrics*

## Salesforce Deal Desk - Common Configurations

Salesforce has many tools that can help define your Deal Desk to automate and simplify this process. Needs will change based on the type of business however, the items below serve as a good starting point to start architecting a Deal Desk.

### Basic Configurations

The Deal Desk solution in Salesforce may be designed to automatically (no human intervention required) skip/approve any Opportunity falling within these types of thresholds:

- The standard MSA and SOW is used with no redlines
- The Opportunity is a renewal and there is no change in price other than the standard x% annual increase applied to all contracts
- The client is not a government entity, nor a vendor or related entity to your organization. (For example - a sale to an auditing firm that is related to your company would require review)
- The pricing of the deal falls within the automatically approved pricing matrix. If no such matrix exists, this is a key prerequisite for Deal Desk success. As an example, a Sales rep may be authorized to discount any Opportunity of under $10,000 by up to 5%. Any one under $100,000 by up to 20% and so on. Over that amount, the Deal Desk motion is triggered and an approval is sent to their manager. For a larger director, to the CRO and so on.

### Advanced Configurations

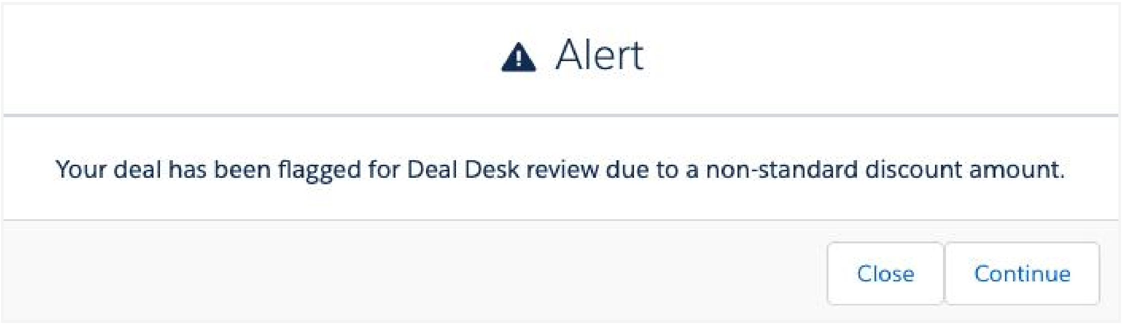
Alternatively, Deal Desk can be configured to handle more complex scenarios, including these five that are relatively common:

1. **Notify a sales rep when their action is going to trigger a deal desk review (to disincentivize them from taking that action)**

In Sales Cloud there is no out-of-the-box solution to easily display a warning to a user that their actions will trigger a review.  One workaround is to write automation, or a formula that indicates when an Opportunity requires review. In this case, dynamic forms can be used to make a text component appear on the screen saying

"*This Opportunity requires Approval*". There are some potential downsides to this; mainly that it requires ongoing maintenance, and depending on how the user is updating the record they may not see this component.

Salesforce CPQ allows you to leverage Products Rules to alert a user when their modification meets a predefined criteria providing additional features and flexibility. Consider for example your business allows your Sales Team to discount up to 20% for your consumer electronics products, but only up to 10% for the additional warranty products. Anything above these thresholds goes to the Deal Desk for review. Using the Product Rule, you can display a message to the Sales Agent on save that says, "*Discounts over 20% will require Deal Desk review*". At this point the Agent can review and lower the discount, or keep the discount. Salesforce can even start the approval process automatically here.




You can customize the message to match specific criteria - so different alerts display when different criteria are met.

**2. Trigger what goes/does not go to Deal Desk**

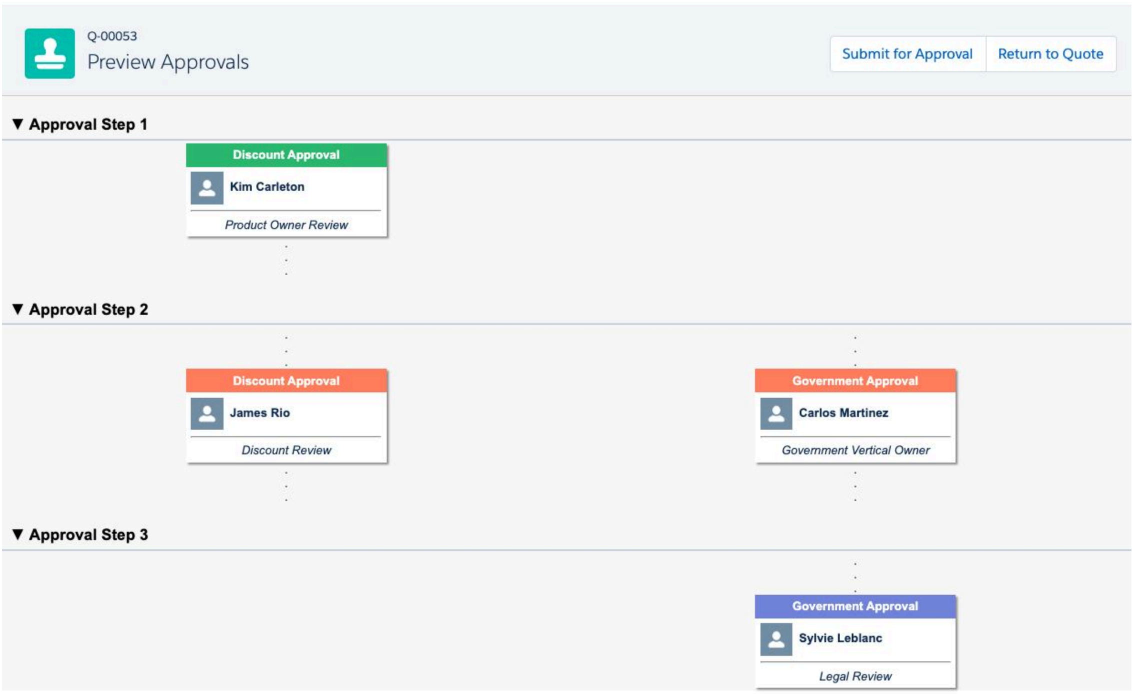
In Sales Cloud, once you have decided what criteria triggers a Deal Desk review you can write your entry criteria for the Deal Desk approval processes. For example, "all deals where the discount is above 20%" OR "if the Account is a Government entity or an entity related to your company" will require Deal Desk review. You can build separate approval processes, with different entry criterias. However, as your approval logic becomes more complex, feature gaps begin to appear in Approval Processes.

Typical problems that appear are:
- Exception cases that make the logic complicated and difficult to maintain
- Different discount thresholds for different products
- Linear approvals are slowing down Sales
- A deal being approved at a 30% discount, only to have the discount change to 25% and require re-approval, rather than being automatically approved.

Additional configuration and supporting fields/automation can bridge the gap temporarily, however leveraging Salesforce CPQ can solve the above problems and provide additional benefits.

### 3. Advanced Approvals/Smart Approvals

Leveraging Advanced approvals with Salesforce CPQ provides several key benefits:
- Smart Approvals will not retrigger approvals on a lower discount amount if a higher one has already been approved
- Approvals processes do not need to be linear, for examples Sales Ops, Professional Services and Procurement can review the Deal at once, and then once all three approve, it can go to legal for final approval
- Sales Reps can Preview Approvals to see who would need to approve and why



- Approvers can be assigned dynamically based on Discount thresholds or other criteria with Approval Rules and Approver & Approver Group Records
- Approvers Delegate field may be leveraged to make sure someone is always available to approve if that Approver is out on vacation, complete with a start and end date for the delegate to take over
- Tracked fields can be used to track the changes on key fields by users during the Approval Process

**4. Staggered Review**

When it comes to your Deal Desk, the review does not have to happen all at once. For example - consider a situation where your Sales Rep wants to apply a 30% discount, however the non-standard terms are still under discussion. Using Approval Rules, Salesforce would prompt the discount approval stream to fire, but not the non-standard terms as in Salesforce the terms are currently standard. Later in the week the non-Standard terms are agreed and updated in Salesforce; this time the approval rules would prompt the legal review, but not the Discount review as Smart Approvals will recognize this as pre-approved. You can also tie these reviews to happen automatically based on Opportunity Stage or Quote Status.

Once you've set up your Deal Desk – you'll want to make sure that all records are approved before they are won. Depending on how you are configuring your Deal Desk, with Approval Processes or Advanced Approvals – you can tie either the "Closed-Won" Stage of your Opportunity or the "Approved" Status of your Quote to Deal Desk Approval using Validation Rules.

**5. Telemetry/Measurement/Reporting**

Tracking the velocity of the approvals is not available out of the box, but with a bit of automation, some custom fields, and a little help from your Admins, (or your favourite Implementation Partner) you can track the average time for a user to approve, or even the average time for a particular step to be approved, and create reports on those details.  This can be done with Approval Processes and Advanced Approvals.


With Advanced Approvals and CPQ, the ability to report goes beyond just the velocity metric. You can track and report on all sorts of other metrics including Deal Desk approval or rejection rates by the submitting user, the rejection rates by stage, or even report on the number of changes to tracked fields, such as how many times a discount was edited during the approval process.

## Common Deal Desk Challenges

The Deal Desk is a critical function that helps bring together the short and long term interests of the company, while involving all necessary stakeholders. However, there are several challenges that can arise when setting up and operating a Deal Desk.

### Balancing Speed and Accuracy

One common challenge is balancing speed and accuracy in the Deal Review process. Organizations have different thresholds for risk and that will impact how complex the Deal Desk process has to be and what percent of Opportunities require review. However, one thing that is consistent across all organizations is that the more onerous the Deal Desk process is, the more creative Sales team members will become in subverting it. No one wants to admit this, but it makes sense. Sales people have one job - close Sales. It is fundamental to their role and also, in most cases, the desire to do so is baked into their personality (and compensation).

The organization should be focused on regularly finding, implementing, and promoting to stakeholders, strategies for streamlining the Deal Review process while maintaining accuracy. Automation is often the focus for this, but this can miss the opportunity to provide nudges to Sales people that will encourage them to structure Opportunities in a way that they don't require review. That means limiting discounting, getting standard terms, etc. and working towards that delicate balance between speed and accuracy.

### Conflicting Priorities

Friction is always going to exist as a natural part of the Deal Desk process. All parties may benefit in the longterm when revenue increases, but in the shorter term, they have very different priorities. One group is focused on closing business and earning commissions, another is on eliminating any possible legal fallout, while another is prioritizing cash flow. To address this challenge, organizations need to establish clear guidelines and decision-making processes that balance the needs of all teams. Building a culture of transparency and collaboration can also help foster trust and alignment between Sales, Legal and Finance teams. The neutral party is Sales Operations. One of the keys to navigating the conflicting priorities of teams is to empower Sales Ops to take the role of process architect, and engage in neutral reporting of success, failure and opportunities for improvement.

## Scaling the Deal Desk as Business Grows

Scaling and evolving the Deal Desk as the business grows can be a challenge. As the organization expands, the scope and complexity of Deal Desk operations may increase, requiring additional resources and tools. Initially, Deal Desk will be a small part of several stakeholders' jobs, but as time and volume grows, so will the impact on team members.

To address this challenge, organizations should regularly assess and optimize their Deal Review process, leveraging technology and automation to improve efficiency. Adapting to changing business needs and demands, and investing in employee training and development, can also help ensure the Deal Desk remains effective and efficient over time.

# Best Practices for Deal Desks in Salesforce

## Change Management and Expectation Setting: Create a Standardized Deal Review Process

Effective Deal Desks require a standardized Deal Review process, continuous review and analysis of performance, and collaboration and communication with Sales, Legal and Finance teams. For this to work, the process must be:

- Well understood
- Clear and well-defined to reduce perceptions of unfairness
- Transparent, in that the individual Sales person has access to reporting that shows where in the process their Opportunity is, with whom and for how long

It is critical to not only construct a good solution, but to train (and retrain) team members on it - a step that is often missed when Deal Desks are updated and deployed. This training needs to focus as much on the “why” as the process. Sales team members should understand why their Opportunities require review, the impacts to the organization financially and from a risk perspective, and what could happen (for example - a lawsuit or court challenge nullifying a deal) if the rules and processes aren’t followed.

A standardized, well-communicated, and transparent Deal Review process helps ensure that all deals are evaluated consistently and fairly, based on key criteria and thresholds. However, just as importantly, it helps ensure that the Sales team *feels* that is the case.

Even in a world where we achieve the above goals (well understood, transparent), in their rush to close a sale, AEs will sometimes do less than the bare minimum to engage. That's where transparency and reports matter. Sales Operations and Sales leadership need to be able to see rejection/issue rates by AEs. For example, it should be visible to all parties if there are particular team members that are frequently having deals rejected at early stages because they have not gotten their prerequisites in order, like a signed MSA, and are therefore wasting the Deal Desk’s time and delaying other better prepared deals from their peers.

## Schedule Continuous Review & Analysis of Deal Desk Performance

Continuous review and analysis of Deal Desk performance is critical for identifying areas for improvement and optimizing the Deal Review process. This includes tracking metrics and KPIs related to deal volume, win rates, and cycle times, as well as regularly assessing and optimizing the Deal Review process itself. Collaboration and communication with Sales, Legal and Finance teams is key, as effective communication channels and tools can help ensure that all teams are aligned and working towards common goals. There needs to be a regular meeting between Deal Desk stakeholders to review KPIs, recent complaints and address any pinch points that Sales Operations is raising.

Ateko recommends that these reviews are scheduled and non-negotiable. For any company, they should be quarterly, ideally soon after EOQ. For more mature organizations at scale, the volume of Opportunities hitting the Deal Desk may be better suited to a monthly review. In all cases, it should be Sales Operations that leads the review and it should be based on actual data.

## Ownership

For the stakeholders that will be part of the ongoing Deal Desk,  it is important that this is not positioned as a side-of-desk project. Rather, it needs to be a primary responsibility and one that generates regular updates for management (eg: how long any opportunities are with them before feedback or approval is provided). Few things are more important than generating revenue and those teams, including Legal, need to understand the urgency behind each Opportunity that routes to them.

There should not be dispersed responsibility. More specifically, approval requests should not be routed to a shared email or group in Legal, Finance etc. where there may be ambiguity about who is in charge of approvals. There needs to be a specific person associated with approval and visibility into who that is.

Similarly, there should not be a single point of failure. There should be mechanisms to deal with Opportunities that are held up by a team member who is unavailable, so that any items normally routed to them are sent to a delegate. If anything is waiting on the responsible party for over a predetermined length of time, it should be automatically flagged, with alerts sent and a notification sent to a delegate to act upon. Too many organizations end up with delayed or even lost sales in the case where an Opportunity sat waiting on approval with someone who was on vacation or even worse, in a shared inbox where no single person owned it and everyone assumed someone else would take care of it.

## Communication & Collaboration Between Teams

The success of a Deal Desk depends on the ability to:

- balance speed and accuracy in the Deal Review process
- manage conflicting priorities and interests between Sales, Legal and Finance teams
- scale and evolve the Deal Desk as the business grows

Strategies for streamlining Deal Review while maintaining accuracy, establishing clear guidelines and decision-making processes, building a culture of transparency and collaboration, and leveraging technology and automation to improve efficiency are all critical for long-term success.

To that end, efficiency and shortening cycles are also important factors for the team's consideration. Every delay and additional point of friction in the process will result in Sales team members circumventing it. Sales is like water and will naturally flow around rocks placed in their way - so if the goal is to ensure deals go through the full process when necessary, it is key to have the right people on board who will design a process that is not so onerous that team members are incented to massage the system to avoid it.

## Conclusion

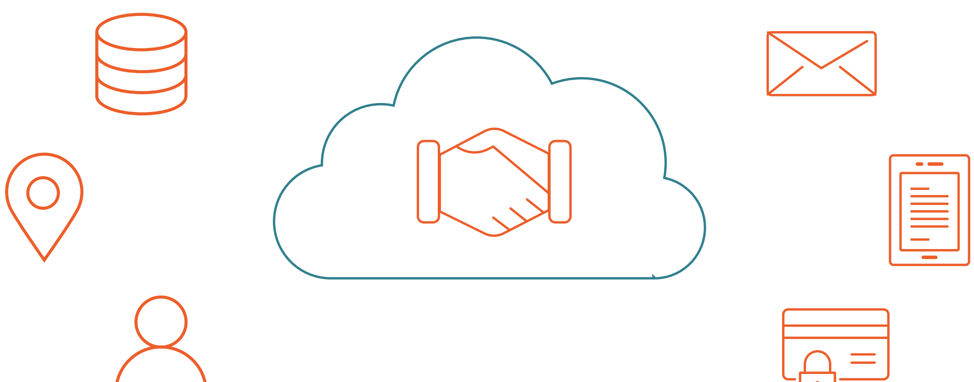
Deal Desks play a crucial role in streamlining the sales process and ensuring efficient deal management. They bring consistency, transparency, and accountability to deal approval and pricing decisions, and are necessary when dealing with complex deals, large transaction volumes, and diverse pricing structures.

The ownership of the Deal Desk varies across organizations, but regardless of its structure, it is important to identify the stakeholders involved and assign clear scope and responsibilities to ensure effective collaboration and decision-making.
To successfully implement and optimize a Deal Desk, it is important to define criteria for pre-emptive approvals, establish streamlined processes, and balance speed and accuracy. Some of the examples provided in this document can help you set up an effective Deal Desk within your Salesforce org.

By following best practices such as creating a standardized deal review process, scheduling continuous review of Deal Desk performance, and promoting communication and collaboration between teams, organizations can overcome common Deal Desk challenges and maximize the effectiveness of their organizations.

### Do you need help implementing or refining your own Deal Desk?

**Talk to us today!**



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