

Automating Revenue Lifecycle Management with Salesforce, SAASTEPS® and CODEN®

A unique approach to Revenue Lifecycle Management

By Stephen Hurrell, October 2026



Introducing SAASTEPS® Revenue Lifecycle Management System, and CODEN® Revenue Lifecycle Concierge

In a world of confusing claims as to what Agentic AI can or should be doing, and a general sense of *token anxiety* when it comes to runaway AI costs, it is sometimes good to take a step back and look to some quieter solutions that get on with the job of providing their customers with proven value. In previous roles I have been both a product and strategy executive as well as an industry analyst. In both my research work and my product executive roles, I covered B2B revenue technology areas addressing multiple pricing models such as subscription, usage and recurring revenue management. The category of software that is used to manage and automate these processes is referred to as Revenue Lifecycle Management (RLM), in recognition of the need to have continuous and frictionless engagement with customers, ensuring they have a sustained positive experience. Capabilities often cited in this overall category include CPQ (configure, price and quote), subscription, contract and renewal management, billing and invoicing, payment processing, collections and optionally e-commerce.

Effective and error-free quoting and billing are just basic needs. Table stakes, even. As for a comprehensive revenue lifecycle management approach, it is not just about every step being covered, from initial engagement, quote, contract and customer onboarding to billing, amendments, renewals and expansion. It is all about how each step can be linked and automated such that the customer experience is seamless and for the vendor, minimizing mistakes and errors that can lead both to customer dissatisfaction as well as loss of revenue.

During my time as analyst at Ventana Research/ISG I led the research into, and the publishing of several comprehensive reviews of the market and the vendors who provide technology solutions for Subscription Management or RLM. As part of the research, I was able to review the vendors' different approaches and architectures. The vendors fell into three broad groups. By far the largest includes those vendors offering a separate platform or application that acts as a

traffic coordinator and provides central control of all things product and service related when it comes to monetization and revenue management. Many of these vendors' DNA is accounts receivable, billing and collections, and more recently revenue recognition. The second group views this technology as an extension or overlay to existing ERP and CX (customer experience). And the third, and by far smallest group, are independent vendors who embed such functionality into existing platforms such as Salesforce's CRM.

One such company is [SAASTEPS](#), whom I first came across while researching vendors for the ISG Subscription Billing 2024 Buyers Guide. And although the company did not qualify for the full survey, their differentiated approach caught my eye.

The SAASTEPS origin story

[SAASTEPS](#)' origins trace directly to founder Tim Beck's two-and-a-half-decade tenure in the CPQ and revenue-management sector, most notably at APTTUS, where he was employee number 13. At APTTUS (now part of Conga), he played a leading role in scaling the company to roughly 1,400 employees across North America and Asia-Pacific. This gave Beck exposure to the needs of the full revenue lifecycle and shaped his conviction that a more integrated approach was both needed and possible. Rather than launching immediately, Beck acquired the SAASTEPS domain well ahead of founding the company, eventually establishing it as a consulting practice built around a Salesforce-native application suite, positioned to give customers a single vendor relationship instead of a fragmented multi-vendor, multi-application stack.

The company's development strategy accelerated with its acquisition of Kinetic Growth's Salesforce-native e-commerce and renewals package, which brought in IP, customers, and personnel, including technical lead Ron Costa.

*“For more than a decade, SAASTEPS has been a trusted PLTW Store partner, helping us deliver high-quality educational products to schools across the country. Their commitment to excellence, reliability, and customer support has made them an important contributor to both the customer experience and the overall success of the PLTW Store. Through strong sales performance and a shared dedication to serving educators, our partnership has generated meaningful financial benefits that help sustain and expand PLTW’s mission-driven work. We are grateful for the collaborative relationship we have built and confidently endorse SAASTEPS as a partner that consistently delivers value to customers and organizations alike. ” - **Matt Cohen, VP of Business Operations, PLTW***

The team then spent the next three years on the necessary stabilization and capabilities consolidation work. As part of this work, the continuing customer engagements exposed the limits of a point-solution focused on e-commerce and renewals alone, prompting expansion into CPQ, payments, contracts, subscriptions, account expansions, and revenue reporting. This led to the realization that these capabilities could operate on a single end-to-end data model spanning pre- and post-sale workflows. That unification is what allows SAASTEPS to convert unstructured customer inputs into structured Salesforce records and to preconfigure implementation requirements, drastically reducing deployment complexity and customers time to value. Beck marks 2023 as the inflection point, coinciding with the company's filing for non-provisional pending patent protection that cover its end-to-end revenue-lifecycle model. This is the moment he considers the product to have matured into a genuine offering that covers upwards of 90% of many customers RLM needs out of the box (OOTB).

For Beck, this is more than a business. He wants the company's actions to reflect a clear purpose: **helping smaller businesses with good ideas grow and succeed.**

That philosophy shapes SAASTEPS' approach to onboarding. The company pre-defines the data model and process flows, an approach that is both deliberate and proven. As a result, most of a new customer's onboarding comes down to completing a survey that describes how their business works. Customers can provide this information by working with a SAASTEPS representative or through [CODEN](#) Concierge, an AI agent. SAASTEPS then uses it to set up the application, which the customer can adjust to fit their specific needs.

*"SAASTEPS' revenue lifecycle management architecture reflects a broader market shift. Rather than sitting alongside Salesforce as a separate application, it embeds a standard data model directly into the platform, which supports outcome-driven and often self-implemented deployments with less maintenance complexity. That same data model turns out to be a natural foundation for AI, because the context a model needs is already structured and already resident rather than assembled after the fact. CODEN runs natively on that model, and it is an early demonstration of what the architecture makes possible. - **Chance Curtis, Principal at Decision DNA Group and an advisor to SAASTEPS.**"*

Why an integrated and consistent data model is key to successful agentic automation of RLM

By embedding the SAASTEPS data model within Salesforce Sales, Service, NPSP, and Community Clouds, the team not only can take advantage of Salesforce's platform strengths, but in addition removes the need to transfer and synchronize data across different applications as in the case of a separate, stand alone CPQ, subscription, contract and renewal management, billing and invoicing, payment processing and collections.

This is important for two principal reasons, the first is that by integrating the data model, both the data and contextual information that are needed to ensure

the accurate and timely hand-off between the different steps are incorporated into an end-to-end revenue lifecycle. Secondly, this tightly integrated data model is a foundational part of the signals and behavioral data that is needed to ensure that organizations can confidently and safely deploy AI agents to orchestrate and manage the end-to-end RLM process. In fact, SAASTEPS goes a step further with its approach to agents, and is building verification capabilities prior to surfacing recommendations or initiating actions as well as before writing any data back.

And whereas announcing AI and agents is no longer novel, SAASTEPS agents running on a single Salesforce instance contrasts with other headline providers, where the application is separate from the front office CRM or the back office accounting and ERP systems. Other providers, operating with separate disconnected systems, make it harder for AI to incorporate valuable signals that help agents to respond in a timely and accurate manner, challenging their ability to deliver a positive customer experience.

The SAASTEPS approach also contributes to alleviating AI token usage and cost anxiety. Unlike traditional SaaS models, provider capabilities that rely on public LLMs do not exhibit declining marginal costs and are in fact closer to a linear cost model. For vendors, this means that they have to move away from traditional per seat SaaS pricing models to come up with pricing models that better insulate them from the costs of utilizing these models. This has led to anxiety among buying organizations used to aligning predictable technology costs with fixed budgets. Typical AI costs for a customer are usage-based and are in addition to SaaS seat pricing. This is very different from how business organizations budget and allocate funds aligned to expected expenses. For smaller organizations, these unpredictable costs are a real cause for concern. And unlike our own personal use of GenAI, organizations cannot stop and wait until the token clock resets!

"It's no mystery that fast-moving small businesses are eager to automate back office friction while they gain insights for growth. While agentic AI is not a magic bullet in revenue lifecycle management, it can certainly help lean teams accomplish more with fewer resources. To deliver on the promise of unlocking future AI-powered revenue opportunities, all AI, including agentic, requires well organized data, astute human governance, and creative leadership capable of designing aligned processes. Partnering with the right software for your growing business can be the difference between success and an expensive science project, especially if they are AI specialists with deep roots working with smaller growth oriented companies." - **Heather Hershey, Senior Research Director of Agentic and Digital Commerce, IDC**

So unique, filed for a Non-Provisional Patent Application.

As evidence of the importance of the SAASTEPS approach, I recently learned in an interview with Tim Beck that the company has received a Notice of Allowance on the claims of a Patent Application. Tim believes this means that customers who use this protected IP in conjunction with their CRM, can have confidence in their revenue lifecycle data layer to support and help drive their business growth for many years to come.

Ease of setup and configuration leads to a rapid time to value.

And these benefits of a proven, single, integrated data model do not just accrue to the outcomes associated with an integrated, end-to-end RLM system, but it also has a positive impact on the level of effort and level of skills required to not just initially configure, but also to modify and amend as business models change and the business grows.

*“At Lenticular Solutions, we love solving business problems for customers. We prioritize customer needs above all and actively seek partnerships with ISV’s who align with our desire to effect change to the benefit of the client. SAASTEPS is our favorite Revenue Lifecycle Management System. We use it internally and recommend it to customers in need of a declarative solution either as a new build or an overhaul to existing CPQ architecture. One of the many benefits of SAASTEPS is the intentional design incorporating AI to ensure a sustainable approach with meaningful interaction leading into the next generation of RLM systems.” - **Chris Fellure, CEO of Lenticular.***

The SAASTEPS team is so confident that the application can be configured and modified by business and front line staff, that they offer free 90-min implementation workshops that will have a customer at least 90% up and running by the close of the training. As evidence of the straightforwardness of the configuration and onboarding, SAASTEPS has certified visual-impaired people as configurators of the application using screen readers and short cut keys.

*“As a screen reader user, I explored some of the features and functionality of the SAASTEPS platform and found the platform accessible during the workshop. I was able to navigate through the platform and complete the assigned tasks independently using my screen reader. At the same time, I also shared feedback on a few areas that could further improve the overall user experience and accessibility of certain features. I appreciate the effort to make the solution more accessible and inclusive for users with disabilities.” - **Harsh Kalra, graduate of Blind Institute of Technology (BIT)***

Given the pace of change and the rapid emergence of new products and services being driven by customer demands and technological change, being able to quickly amend pricing models and have these supported by the

application with a minimum of delay is vitally important for organizations to remain competitive and responsive.

Summary of Current and Future Benefits

- **Embedded native in Salesforce** eliminates integration and data-silo risks, resulting in higher adoption and creates a single source of truth for revenue teams.
- **A predefined, extensible data model covering 90% of customer needs** gives most organizations a working best-practice foundation on day one, resulting in lower implementation cost and risk.
- **Business-user-configurable setup and changes** remove IT bottlenecks, resulting in faster time to value now and faster time to adapt later.
- **Embedded process and policy context within Sales, Services, NSPS, Community Clouds** gives AI Agents access to complete, unified signals, resulting in more accurate and trustworthy AI-driven actions across the revenue lifecycle.
- **Minimized AI token usage via the SAASTEPS/CODEN Concierge approach** keeps costs predictable, resulting in reduced token anxiety and more confident AI deployment.

"Organizations don't always need the flashiest technology or the loudest vendor - they need the right fit. In revenue lifecycle management, SAASTEPS has quietly built out capabilities that address most of what organizations actually require. By embedding within Salesforce core CRM clouds, SAASTEPS leverages a proven data and metadata model that adds richer context; enabling faster, safer development of agentic capabilities to extend automation and improve operational efficiency." - **Stephen Hurrell, Industry Analyst (ISG/Ventana Research), Technology Executive and SAASTEPS advisor.**