



EAB's AI-Assisted Deal Desk Review with Claude and Xoriant



Executive Summary

EAB partnered with Xoriant to automate deal desk validation for its Program Order Forms. Every signed order form PDF must be checked against the corresponding Salesforce CPQ quote before a deal is finalized – a slow and error-prone manual process.

Xoriant built an AI-assisted review service on Anthropic's Claude models that reads each signed PDF and compares pricing tables, program dates, signatures, legal clauses, logos and contact details with the CPQ quote.

Differences are flagged for a Deal Desk reviewer, so every order form is validated field by field while a person still owns the final call.



EAB

EAB is an education research, technology and services firm that partners with thousands of schools, colleges and universities. Its Deal Desk validates every signed Program Order Form against the Salesforce CPQ quote before a deal is booked.

Key Requirements

EAB's Deal Desk compared signed signed Program Order Form PDFs with Salesforce CPQ quotes by hand. Document volume and page count made the check slow and inconsistent, and a missed clause or a stale price could flow straight into a booked deal. Key requirements included:

- ▶ **Document Intelligence:** Extract key fields from signed Program Order Form PDFs.
- ▶ **Quote Reconciliation:** Compare each field with the matching Salesforce CPQ quote.
- ▶ **Audit and Governance:** Log every comparison and reviewer decision.
- ▶ **Discrepancy Flagging:** Surface pricing, date, clause and signature mismatches.
- ▶ **Human-in-the-Loop:** Route every flagged deal to a reviewer before finalisation.

EAB required a reviewer-assisted service that could absorb high order form volumes without weakening deal governance or audit trails.



Voice of the Customer

Xoriant's use of Anthropic's Claude models has changed how our Deal Desk works. Signed Program Order Forms are now read and reconciled against the Salesforce CPQ quote automatically, and our reviewers spend their time on the exceptions that matter instead of page-by-page checking. Deal review is faster and far more consistent."

Karl Brenneman
Managing Director, IT Development, EAB Global

Why Anthropic's Claude & Xoriant?

EAB required three integrated capabilities:

- **Anthropic's Claude Models:** Claude reads signed order form PDFs and reasons over pricing tables, dates, clauses and signature blocks.
- **Salesforce CPQ Integration:** Quote, pricing and program data is pulled from Salesforce for field-level comparison.
- **Xoriant Engineering Expertise:** Salesforce platform, AI engineering and release governance skills in one delivery team.
- **Document Handling:** Reliable handling of scanned and native PDFs, multi-page pricing tables and non-standard legal language.
- **Quality Assurance:** Validate extraction accuracy and comparison rules through iterative review cycles.

The Xoriant Approach: Engineering AI-Assisted Deal Review

Combining Salesforce CPQ expertise with AI engineering, Xoriant delivered a structured approach to automating order form validation for EAB's Deal Desk.

01

Order Form Ingestion

Built an intake service that captures signed Program Order Form PDFs, normalises scanned and native documents and links each one to its Salesforce opportunity.

02

Claude-Powered Extraction

Used Anthropic's Claude models via the Claude API to extract pricing tables, program dates, signatures, legal clauses and contact details from each order form.

03

CPQ Comparison Engine

Compared every extracted field with the matching Salesforce CPQ quote using configurable materiality rules, producing a scored discrepancy report for review.

04

Governed Review and Release

Routed flagged deals to Deal Desk reviewers and governed every Salesforce change through a controlled deployment, backup and rollback process.

The Outcome: A Faster, Governed Deal Desk

Following the rollout, EAB established a validated path to:



Lower Manual Review Effort

Average manual review time per Program Order Form reduced by 70%.



Complete Validation Coverage

100% of signed Program Order Forms are validated field by field against the CPQ quote.



AI-Assisted Document Review

Anthropic's Claude models read and interpret signed order form PDFs at scale.



Faster Deal Turnaround

Discrepancies surface before finalisation instead of after a deal is booked.



Governed Salesforce Releases

Controlled deployment, backup and rollback protect production data.



Auditable Deal Governance

Every comparison, flag and reviewer decision is logged for compliance review.

The Claude-powered comparison service gives EAB a consistent, auditable checkpoint in the quote-to-cash cycle, delivered and supported by Xoriant as an ongoing engagement.

About Xoriant

Xoriant is a Silicon Valley-headquartered digital product engineering, software development, and technology services firm with offices in the USA, UK, Ireland, Mexico, Canada and Asia. From startups to the Fortune 100, we deliver innovative solutions, accelerating time to market and ensuring our clients' competitiveness in industries like BFSI, High Tech, Healthcare, Manufacturing and Retail. Across all our technology focus areas—digital product engineering, DevOps, cloud, infrastructure, and security, big data and analytics, data engineering, management and governance—every solution we develop benefits from our product engineering pedigree. It also includes successful methodologies, framework components, and accelerators for rapidly solving important client challenges. For 30 years and counting, we have taken great pride in our long-lasting, deep relationships with our clients.