



**Automating the
CPQ Process to
Drive Your
Business Forward**



It's one thing for a person to do some research, go to a hardware store, and purchase a lawnmower. It's another thing entirely for a construction company to research and purchase a fleet of vehicles for its business.

For industries such as manufacturing, building services, automotive, and utility operations that have complex product and service offerings, the sales and quoting processes can be cumbersome. They involve a series of interconnected decisions, each of which often has a direct impact on the resulting product.

For such industries, automating the Configure, Price, Quote (CPQ) process with a highly flexible solution can save themselves and their prospective customers time and reduce costs. The CPQ process backed by CPQ software helps:

- Eliminate dependency on extensive paperwork
- Expedite the configuration and quoting process
- Help reduce errors
- Reduce costs associated with errors and delays



Quote time **reduced from hours to minutes**—customers report **75% of quote time reduction**.

Increase quote volumes and win more business over your competition.



CPQ Benefits

There are three primary ways that complex configuration and quoting processes benefit from the guidance of a CPQ system:



1. Greater Efficiency

Automation simplifies the selection and configuration process, especially when it has a high level of complexity, either in terms of the logic it takes to get to the right set of products, or the guidance required to navigate the customer toward a configured product.



2. Improved Quoting Speed

In industries such as heavy equipment manufacturing and commercial building, operations are so complex that a CPQ system is essential to help navigate the process of coming up with an accurate pricing. With logic-based calculations built-in CPQ software, complexity can be reduced enough that customers can quickly generate the count themselves.



3. Robust Data Integrity

With a highly configurable solution, all details and data coming out of the system are accurate.

Combining all three can optimize sales processes, giving you a competitive advantage in your sector.

Ensure Accurate Decisions

Consider a heavy equipment manufacturer that has factories all over the world and turns out hundreds of forklifts every day. A lot of specialized, expensive components are involved, and the manufacturing processes are complex and intricate. Even after the forklifts are configured, manufactured, and assembled, they have to be delivered to customers through a sophisticated distribution network.

A CPQ solution can help streamline the myriad interconnected decisions that go into bringing those processes to a conclusion.

Lacking a CPQ system, employees of the manufacturer must pick and choose the options they feel are correct for the particular equipment the customer is interested in purchasing. Any mistake would be expensive and time-consuming. A CPQ solution can help guide a sales or manufacturing professional through the process, avoiding the sub-optimal decisions that could change a plethora of things in a negative way. And a CPQ system not only guides employees through the process, but it also helps them track all those decisions.



Quickly configure quotes and orders with **100% accuracy**, leading to **dramatic gains in revenue and profitability**.

Deliver accurate quotes and orders every time, eliminating costly rework and customer frustration.

Enterprise Integration Eliminates Cost Overruns

Intelligent and customizable CPQ solutions can also integrate with existing CRM and ERP systems to maximize the impact of existing corporate data and ensure accurate final decisions. Experlogix CPQ integrates with Microsoft Dynamics, as well as NetSuite and Salesforce. That integration helps customers bring in data from the CRM or ERP system to the CPQ software to further streamline the quote-to-order process. It is less expensive and time-consuming for the customer, since it integrates with their existing technology.

CPQ Process 2.0

Automated CPQ systems can simplify the quote-to-order process and help expedite and refine the sales process for complex manufacturing products. Production orders can be configured more accurately and rapidly and customized to suit customer requirements. Modern CPQ systems—such as Experlogix CPQ—feature:

- Increased speed and agility
- A dynamic feature set for filtering and processing data
- The ability to develop, track, and manage various pricing options for different hierarchies
- Flexibility and customization within established business rule sets
- Ease of deployment and maintenance
- Refined and customizable user experience
- Simplified integration with enterprise systems such as CRM and ERP

Automating the CPQ process allows for greater customization, which provides:

- The **opportunity** for salespeople to upsell additional options
- The **ability** to expand the range of available SKUs
- The **flexibility** to reach to a broader customer audience

The Experlogix CPQ solution is fully customizable to meet your unique business needs. Other applications may give you a certain amount of flexibility to create your interface, which usually means you can move things around on a set of pre-built, templated screens. With Experlogix, you start with a blank page. You get to decide how that page is going to look and how the workflow will run.

This level of customization also helps reduce the learning curve and requisite training time, because you're creating an interface that's set up just the way you want from scratch. You're creating something intuitive and adaptive, which eases user adoption.



Simple-to-use, yet powerful
configuration technology.

A single CPQ solution for field, corporate, dealer, and mobile users, fully integrated with CRM and ERP platforms.

Experlogix can help with initial customizations as well. In probably 98% of situations, we do not require any custom scripting or custom development. We take the customer's products and quickly create a framework and templates that it can populate with its data.



Evolving CPQ

The future of the CPQ process could evolve to incorporate even more significant customer experience functionality, such as:

- Product design and configuration visualization, further enhanced by 3D glasses, virtual reality or augmented reality
- Existing configuration platform exposed to the customer base through a portal
- Expanded mobile device support
- Reusable templates
- CPQ system powered with AI to increase capability and capacity
- The ability for customers to customize CPQ systems on their own or perform their implementations



Engage the Business

CPQ software is more external-facing and truly drives business results and customer interactions for complex products and services sales, so it has more of a direct business impact than an IT impact.

CPQ software systems can help business leaders who are involved in producing and delivering complex products do the following:

- Make better-informed business decisions regarding configuration options
- Optimize existing corporate data stored in CRM and ERP systems
- Reduce costs associated with manual CRM integration
- Dynamically process and analyze data within parametric constraints
- Ensure that all configuration options are compatible
- Deliver highly customized options to increase customer engagement

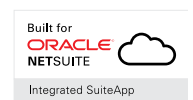
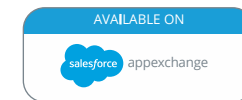
For industries with complex product offerings—such as heavy equipment manufacturing, commercial building, and utility operations—automating the CPQ process with a flexible system can expedite the entire sales cycle, save time, and reduce costs.



Want to learn how Experlogix CPQ can help your business?

Contact us to schedule a personalized one-on-one demo.

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