# Understanding Experlogix CPQ

## *A Strategic Overview*

### What is CPQ (Configure, Price, Quote) Software?

CPQ software acts as a rules-driven automation engine that connects sales, product, finance, and operations teams. It allows sales teams to efficiently configure and quote complex orders without sacrificing accuracy or quality of service.

### Key Benefits of CPQ:

- **Improved Accuracy –** Eliminate costly quoting errors with guided rules and logic-driven configuration constraints.
- **Scalable Knowledge –** Codify product expertise and pricing strategy into your system.
- **Higher Win Rates –** Respond faster, quote smarter and tailor proposals to win more deals.
- **Automated Workflows –** Link CPQ directly to your CRM and ERP systems to simplify approvals and other workflows, while eliminating data silos.



# How Different Industries Use CPQ

## Manufacturing & Industrial

- Configuring complex assemblies, parts, and options
- Product visualisation and CAD integration
- Integration with ERP for automated BOM routing

## Technology & Software

- Subscription-based pricing
- Bundled services, custom contracts and mixed product/service ecosystems
- Accelerated product releases

## Healthcare & Medical Devices

- Improved quote accuracy for highly regulated products
- Region-specific compliance rules
- Handling regional and contract pricing

## Professional Services

- Custom engagements with variable scope
- Time-based or tiered pricing
- Side-by-side service bundle comparisons

## Construction & Equipment

- Multi-product configurations
- Territory-based pricing
- Visual quoting tools and CAD integration

# Let's Talk ROI

When fully leveraged, CPQ doesn't just improve quoting—it becomes a revenue accelerator and strategic enabler, making every salesperson more effective. Here are just a few of the ways that CPQ can increase efficiency and revenue:

## Faster Sales Cycles

Shorten the time between interest and order by giving reps the tools to quote on the spot, even for complex configurations. CPQ features like 3D product visualisation also make the customer experience more engaging.

## Higher Margin Deals

Make it easier for your sales team to upsell and cross-sell by using features like guided selling. With CPQ, your product and sales knowledge become a scalable business asset.

## Stronger Governance

Ensure every quote complies with internal policies, sales practices, product compatibility, and market regulations. CPQ enforces consistency in your sales strategy, regardless of who's selling for you.



# Understanding Experlogix Document Automation

*A Strategic Overview*

## What is Document Automation Software?

Document Automation software creates, manages, stores and delivers business documents without manual input. It replaces repetitive tasks with intelligent workflows, enabling users to generate contracts, proposals, invoices, and compliance documents more accurately and at scale. At its core, document automation leverages predefined templates, workflows, and data integration to streamline document-related tasks, reducing manual effort, driving consistency, reducing time, and mitigating human error.

### Key Benefits of Document Automation:

- **Efficiency & Speed:** Automate repetitive tasks, generating thousands of documents instantly
- **Increased Accuracy:** Reduce errors using easy-to-build templates and automated data sourcing.
- **Compliant & Engaging Documents:** Maintain consistency in language, branding, and regulatory content throughout documents.
- **Cost Reduction:** Lowers operational costs by reducing manual efforts and automating routine tasks.



# Feature Highlight

## Low Code

- Automate the creation, management, and delivery of documents with minimal coding or dependence on IT.

## Full-Feature Template Designer

- Microsoft Word add-in to build dynamic, reusable templates.
- Supports conditional logic, variables, tables, and rich formatting.

## Automated Workflows

- Automate the creation, generation, management, delivery, storage, and e-signature of business documents.
- Easy to configure automated workflows, built leveraging conditional logic without programming.

## Smart Forms

- AI-generated forms to streamline data collection.
- Web-based forms to collect the info you need and instantly generate documents.

## Data Capture

- Source data from wherever you store it using plug-and-play connectors to major CRM and ERP, or your established systems.
- Create and combine multiple data sets from custom and standard entities.

## eSignature Integration

- Connect with providers such as DocuSign, Adobe Sign, Sertifi, OneSpan Sign, and ConsignO Cloud.
- Ensure secure and legally compliant signing, closing deals faster.

## Content Manager

- Central repository to manage template versions, clauses, and assets.
- Control access, track changes, and manage approvals.

# Experlogix CPQ Case Studies

## Howden Netherlands

Howden Netherlands cut order pricing time by a **staggering 83%** while boosting order values through guided selling tools.

> "Experlogix proved again and again that switching from our old system was a good idea. After initial implementation and training, Experlogix software doesn't require hard coding to maintain."

*— Eelko Molenhuis, QA and Continuous Improvement Manager at Howden*

## Evatec

High-tech coating machine manufacturer Evatec used CPQ to replace a system of spreadsheets and siloed systems. This led to a reduction in configuration time from **several hours to a few minutes.**

> "We have really complex products and processes. When we were evaluating different CPQ tools, the Experlogix Design Center looked more suitable than other solutions. We were also able to get good support; the intuitive user experience and the trainings we received made it clear how to model configurations."

*— Flavia Manz Project Leader at Evatec*

## FotoFinder

Medical imaging manufacturer FotoFinder reduced time-to-quote from 25 minutes to just two — a **92% reduction.** Plus, sales onboarding is now a lot easier because CPQ guides team members through the process.

> "Experlogix is making things easier for our newcomers – removing the reliance on tribal knowledge. It's been a great part of the training plan."

*— Roland Proske, Head of IT and Digital at FotoFinder*

# Experlogix CPQ Implementation and Maintenance

There are several key elements to a successful CPQ implementation:

- Establish clear, measurable goals and requirements.
- Get all the right people together at the right time (product, sales, IT, engineering).
- Assign at least one dedicated person to manage and model in the software.
- Attend solution training for ongoing support and administration.

Optimising CPQ implementation requires extensive product and process knowledge, so that the software can enforce sales strategies and support your product ecosystem.

## Experlogix offers two paths for implementing our CPQ solution:

**Train the Trainer:** Reduce your up-front services investment and gain hands-on training designed to help you understand how to set up and maintain your product configurator.

**Turnkey:** Some clients prefer our team of configurator experts to provide end-to-end, turnkey configurator implementation services. These engagements include a well-defined, tested, and proven set of implementation phases:

- Discovery and Solution Definition
- Data Migration
- Rules & Formula Logic
- User Interface Design
- Testing
- Conference Room Pilots
- User Training
- Go-Live Support
- Post-Implementation Audit

**In addition to implementation support, Experlogix offers ongoing training for users who are interested in truly mastering our software.**

**On-Site Services –**

Receive hands-on support from experienced implementation engineers at your location(s). Technicians are available to assist with product training, project management leadership, and turnkey implementation delivery.

**Online Services –**

Cost-effective approach to training & implementation support via online assistance. Our implementation engineers deliver successful projects worldwide using modern online virtual meeting technology.

> "From implementation and training to support and recognition, Experlogix CPQ is so much more than just software."

*— Kim Ouellette, Sales Operations Analyst at Tyler Technologies*

Clients often come to us when they've outgrown other solutions and need to scale further, or when they're just looking for more customisability in their CPQ software.

> "Experlogix provides an open framework for you to build almost anything. The more you learn how to use it, the more you realise what you can do with it."

*— Henrik Sandberg, IT Manager at Swecon Group*

## Why Choose Experlogix CPQ?

### Experlogix CPQ Delivers:

- Integration with Microsoft Dynamics 365 & Salesforce via our integration platform Cloud Connect™
- Design Center — A powerful but intuitive administration interface (Excel-based logic, no code required)
- Ability to handle thousands of configurations across regions and product lines
- Tools for guided selling, 3D visualisation, and dealer portals
- An in-depth onboarding process and client training

### What is Cloud Connect™ Integration?

Cloud Connect™ is the scalable Experlogix CPQ cloud-based integration service. It is a 100% Flexible integration framework that dynamically connects our CPQ solution to entities within CRM and ERP systems. The Cloud Connect integration provides clients with flexibility, a lower cost of ownership and increased performance.



## Is Experlogix Right for You?

Experlogix CPQ is purpose-built for organisations that don’t fit in a one-size-fits-all mold. Our solution offers an unparalleled combination of customisability, control and usability—in other words, it's the solution that'll grow with you instead of limiting your future potential.

### Technical Resources

CRM D365 Technical Overview.pdf

FO D365 Technical Overview.pdf

CPQ D365 Fin Ops_Architecture_Horiz_0824.png (Architecture Diagram)

CPQ D365 Sales_Architecture_Horiz_0824.png (Architecture Diagram)

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