experlogix

CPQ That's AI-First And Industrial-Grade

Quote complex solutions with the ease of AI,
but without gambling on accuracy or margin.



TL;DR

- AI has gone from a cool experiment to an everyday business tool in a few years, and AI agents now act inside business systems, not just answer questions.
- For providers of complex, engineered solutions, quoting can become as easy as a conversation. On its own, though, AI can also make costly errors faster.
- The answer is CPQ that's AI-first and industrial-grade: AI handles the conversation, and a deterministic rules engine decides what can be built, what it costs and what's approved.
- Experlogix CPQ delivers both through Elix, its virtual assistant, AI agents across the order lifecycle and published MCP servers that work with the AI platform you choose.
- The payoff: accurate quotes in minutes, protected margins, fewer costly errors and expertise that scales. Start by codifying your rules, piloting one or two use cases and deciding what AI may do on its own.

The Quote Is Where Strategy Meets the Customer

Every price, option, service commitment and delivery date your company stands behind comes together in the quote. That makes it arguably the most consequential document a sales team produces, and for integrated solution providers it is also where complexity concentrates.

This paper is about industrial-grade CPQ for those providers: industrial engineering firms, manufacturers embracing servitization (the shift from selling equipment to selling outcomes, services and subscriptions), and other providers whose offerings are engineered, configured and delivered as solutions rather than picked from a catalog. A typical order pairs engineer-to-order equipment with the services to deliver, assemble, integrate, prove out and start it up on site, priced under customer-specific agreements and governed by engineering constraints that only a handful of experts fully understand. Even a quote with a single revenue stream can carry thousands of interdependent rules.

AI promises to make all of this faster, and it can. Used alone, it also introduces a new risk: quotes that look polished and authoritative but break the rules that keep orders buildable and deals profitable. The organizations that benefit most will pair AI's speed with an industrial-grade rules engine. We call that combination CPQ that is AI-first and industrial-grade.

The Business Value at Stake

AI-first, industrial-grade CPQ creates value in seven ways that matter to executives.

Quote complex solutions in minutes, not days

Sellers and partners describe what the customer needs in plain language and receive a complete, validated configuration and quote. In complex sales, the first vendor to put one correct number in front of the buyer usually keeps the momentum.

Protect margin on every deal

Contract pricing, discount policies, approval thresholds and margin rules are enforced automatically, no matter who builds the quote or how the request arrived.

Stop costly errors before they reach the plant or the job site

Incompatible options, missing components and under-scoped services are caught before an order exists, avoiding rework, delayed shipments, extra site visits and difficult conversations with customers.

Sell the complete solution

AI surfaces what the customer asked for across emails and meetings, and what similar projects required, from installation and startup services to monitoring and maintenance, so scope and revenue are not left on the table.

Scale scarce expertise

New sellers and channel partners can quote engineered offerings without years of product knowledge, while sales engineers spend their time on novel problems instead of routine "can we build this?" questions.

Launch and change offerings faster

AI agents help administrators turn pricing decisions, new options and policy changes into CPQ rules, shortening implementation and keeping the system current as strategy shifts.

Future-proof your AI investment

Because AI connects to CPQ through an open standard and the rules live in a deterministic engine, you can adopt new AI platforms and models without rewriting business logic or re-validating every quote.



A Complex Quote, Built in a Conversation

Consider Scott, a sales leader at a company that designs, builds and commissions industrial processing systems. Between shots at the driving range, he receives a notification on his phone from a customer asking for a quote. Scott starts talking through the virtual assistant on his phone that's connected to his CRM. In turn, Scott's CRM engages Elix (powered by Experlogix CPQ), to quote another processing unit for VanBourne Industrial Group's Louisville plant.

With information from the account in hand, Elix confirms whether the new unit is for the XP-900 platform VanBourne is standardizing on. Scott confirms and adds the high-capacity overdrive package. Elix configures this quote and, drawing on records from VanBourne's previous Louisville installation, recommends a reinforced mounting system because vibration issues were measured after that deployment. Scott agrees.

Then the Experlogix CPQ rules engine does its work. The requested throughput requires the expanded-capacity cooling assembly, since the standard package is not compatible with this configuration, and the larger assembly needs a larger installation crew, so the labor estimate changes too. Reviewing the email thread, Elix notes that VanBourne's project lead asked for on-site assembly, integration and startup testing, and that a project of this size requires uncrating logistics before installation can begin. Each is added.

Elix applies the contracted discount on the high-capacity drive package under VanBourne's strategic pricing agreement. It also recommends the remote monitoring module, which comparable customers often add after deployment, because installing it during commissioning reduces cost. Scott accepts. The quote is checked, formatted and, at Scott's instruction, sent as a reply to the customer's email from that morning.

In a few minutes, Scott produced a quote covering engineer-to-order equipment, required components, logistics, installation, testing, contract pricing and a recommended option. AI handled the conversation and the context with Scott's CRM and Experlogix CPQ forming the foundation and guardrails. The rules engine ensured that every element was compatible, buildable and correctly priced. And Scott, not the AI, decided when it went to the customer.

This scenario is illustrative and for information purposes only.

What We Mean by AI-First

"AI-first" has become a crowded label. At Experlogix it means four commitments and one firm foundation.

1. First, conversation is the front door. Sellers, partners, administrators and, increasingly, customers can describe what they need in their own words. Elix and the agents supporting it translate that intent into structured requirements, ask clarifying questions, recommend options and explain results.

2. Second, CPQ is agent-ready by design. Experlogix publishes Model Context Protocol (MCP) servers that expose configuration models, rules and quote data to AI agents in a structured, governed way, so the AI platform your organization chooses can work with CPQ directly.

3. Third, AI works across the whole lifecycle rather than in a single feature: setting up and maintaining rules, configuring orders, building quotes, validating changes and generating customer documents.

4. Fourth, AI is predictable, explainable, embedded in existing workflows and built for enterprise governance. You decide how much autonomy it has, and anything AI influences can be reviewed before it becomes final.

The foundation: AI-first does not mean AI-only. AI is never relied upon to evaluate rules, perform calculations, set prices or generate the final document. Those jobs belong to the deterministic engine, which returns the same answer for the same inputs every time.

That is where industrial-grade comes in. Industrial-grade CPQ models real engineering complexity: thousands of interdependent options, engineer-to-order variants, BOM (bills of materials) and routings, services scoped to the configuration, regional and multi-currency rules, customer agreements, approvals and, where needed, one-time, recurring and usage-based pricing in a single quote. It integrates with your CRM and ERP, so every quote reflects current data, and business users maintain it without code.

The two ideas reinforce each other. In IBM's 2026 CEO study, leaders said they expect AI to make **48% of operational decisions** "where consistency and guardrails can be codified" without human intervention by 2030, **up from 25% today**. Codified guardrails are exactly what an industrial-grade rules engine provides. The more of your quoting logic you codify, the more AI can safely do.

AI Agents Across the Order Lifecycle

Experlogix CPQ puts AI to work through Elix and a set of specialized agents. Each has a defined job, and each is bound by the same rules engine.

Setup and Maintenance Agents shorten implementation and keep CPQ current. They consult financial planning, operations and CRM data and collaborate with your administrators to quickly turn business decisions into CPQ rules, covering product catalogs and options, bundling and eligibility, price books and tiers, surcharges, discount schedules, margin rules, approval thresholds, special pricing agreements, partner and dealer programs, currency and tax rules, and renewal terms. New offerings, including new services, reach your sales teams and dealer networks sooner. To be clear, AI isn't autonomously crafting your CPQ implementation. Instead, it's accelerating it by performing analysis that will simplify and speed implementation, maintenance, and extension of your CPQ.

The Order Configuration Agent turns customer needs into valid configurations. It reads requirements arriving via your CRM from customer emails, texts, chats, phone or website forms, draws on CRM and ERP records and order history, and builds the configuration through the rules engine. When a request cannot be built as asked, the agent explains why in plain language and proposes a valid alternative (before anything reaches the quote)—similar to how an experienced applications engineer might react.





The Quoting Agent assembles the deal. Through your CRM, it reads customer emails, chats, call transcripts and order history, then configures, prices and delivers a compliant quote into the CRM, ready for the seller's review. The quote conforms to your configured order and business rules, not to the whims of an AI language model or whichever model version is running that day.



The Order Configuration Validation Agent protects orders long after the first quote. Much of the order lifecycle is change: a customer adds capacity, engineering substitutes a component, a delivery date moves. Each change produces a potential revised order that simply needs to be validated. This agent runs continuously in tandem with your CRM on quotes, orders and engineering change requests, checks each against the rules engine, flags violations with clear corrective suggestions and returns a go or no-go status.

Around these agents, Experlogix Document Automation turns validated configurations into proposals, contracts and technical documents, with AI translation into more than 130 languages, while bills of materials, routings and clean orders flow to production, service and finance. Routine feasibility questions, such as whether an option can ship in a given region, get immediate answers from the same rule model, freeing sales engineers for the problems that truly need them.

Utilize the following Experlogix CPQ agents: Setup and Maintenance Agents, Order Configuration Agent, Quoting Agent, and Order Configuration Validation Agent.

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Open by Design: MCP and the AI Platform You Choose

Many organizations are standardizing on an enterprise AI assistant or agent platform, such as Microsoft Copilot or Google Gemini, and they expect their business systems to work with it. The Model Context Protocol makes that practical. Often described as "USB-C for AI," MCP is an open standard that gives AI agents a consistent, secure way to discover and use business systems.

Experlogix publishes MCP servers for both Experlogix CPQ and Experlogix Document Automation. Through the CPQ server, an authorized agent can retrieve configuration information and the state of a quote, create or update configurations, and read the model's metadata: the products, options, rules and constraints it must respect. Using the Experlogix Document Automation MCP server, agents discover what they are permitted to do, learn what inputs a process requires, validate those inputs before anything executes, follow progress in real time and return finished documents within the conversation.

Three design choices matter to executives. Business logic is never duplicated: the AI interprets intent while CPQ executes and enforces the rules, so there are not two versions of the truth to reconcile. Every action runs under the same permissions, approvals and audit trail as a human user. And autonomy is a dial you control, from assisted quoting with human review to fully automated workflows in which an inbound email triggers a configured quote. We recommend keeping people in the loop for binding commitments, such as nonstandard discounts and final price or delivery promises.

Experlogix CPQ also integrates with the platforms where your data lives, including Salesforce, Microsoft Dynamics 365 and other CRM and ERP platforms, so AI works from current prices, configurations and customer records rather than yesterday's batch sync.

AI agents can retrieve configuration information and the state of a quote, create or update configurations, and read the model's metadata.



Measure	Data point	Source
AI in job titles	US job titles with "AI" in the title rose from 264 in 2022 to 822 in early 2026, about 1 in 12 titles; 63% are outside tech, including sales, customer service and skilled trades	Indeed Hiring Lab, July 2026
AI leadership roles	Companies sought to fill 225,000 head-of-AI jobs from 2023 through 2025, up 49% from the prior four years	The Wall Street Journal, citing LinkedIn data, April 2026
Fastest-growing title	AI engineer is the fastest-growing US job title for the second year running	LinkedIn, January 2026
AI in job postings	A record 7.3% of US job postings mentioned AI in September 2026, up from 4.2% in December 2025	Indeed Hiring Lab, October 2026
AI in the C-suite	76% of organizations in IBM's global CEO survey have a Chief AI Officer, up from 26% a year earlier; formal CAIO titles appear at about 1 in 10 large US public companies	IBM, May 2026; CFO Dive, October 2026
Enterprise adoption	Nearly 9 in 10 organizations use AI; 40% of companies with more than $1 billion in revenue are scaling AI agents, up from 27%	McKinsey, August 2026
US businesses	19.8% of US businesses used AI in a business function, including 37% of firms with 250 or more employees	US Census Bureau, May 2026
The workforce	About 41% of US workers used generative AI in their jobs in late 2025; manufacturing posted the largest year-over-year increase	Federal Reserve Board, April 2026
Agents in software	40% of enterprise applications will include task-specific AI agents by the end of 2026, up from under 5% in 2025 (forecast)	Gartner, August 2025
Open standards	MCP is supported by ChatGPT, Gemini and Copilot and governed by a Linux Foundation body with more than 300 members	Linux Foundation, October 2026

Figures as reported by each source. Full citations appear at the end of this paper.

Getting Started: Readiness, Questions and Measures

Five conditions separate organizations that capture AI's value in quoting from those that pilot and stall.

1. **Codify your rules.** Put product, pricing, service and contract logic in one governed engine rather than in spreadsheets and experts' heads.

2. **Connect your data.** Integrate CPQ with CRM and ERP so AI sees current customers, prices and inventory.

3. **Set the limits of autonomy.** Decide what AI may do alone, what needs review and what always needs approval.

4. **Start focused.** Choose one or two high-volume, high-friction use cases, such as quoting from customer emails or validating change orders.

5. **Lead the change.** In IBM's CEO study, 83% of CEOs said AI success depends more on people's adoption than on technology, so sponsor it visibly, train teams and give sales, engineering, finance and IT shared ownership.

When you evaluate any CPQ and AI approach, ask where pricing and configuration logic live: in the AI model, a rules engine or a spreadsheet. Ask whether a quote that breaks your rules can even be generated, whether AI produces final numbers or retrieves them from a validated source, how rules are updated when policy changes, whether the AI connection is built on an open standard, and whether the system can model your full complexity, from engineer-to-order variants to on-site services.

Then track a short scorecard: time to quote, revision cycles, quote-to-order error and rework rates, discount leakage, services attachment, ramp time for new sellers and partners, sales engineering hours spent on routine questions, and the time it takes to put a pricing or offer change into effect.

Pilot your CPQ with your toughest and most complex quotes.

Conclusion: Automate the Right Layer, Starting Now

AI is no longer a cool experiment. As the evidence in this paper shows, its capabilities are rapidly expanding, adoption has spread from technology teams into sales and operations, and AI agents are beginning to act for buyers and sellers alike. For integrated solution providers, that creates a real opportunity: quoting complex, engineered offerings as quickly and naturally as having a conversation.

Speed alone is not the goal. As this paper's analysis of quoting errors shows, AI on its own can make costly mistakes faster, and the customer results show how much value a deterministic, industrial-grade rules engine already protects. The companies that pull ahead won't be the ones that automated the fastest. They'll be the ones that automated the right layer: **AI for the conversation and context, CPQ for configuration, pricing and enforcement.**

That is what we mean by CPQ that is AI-first and industrial-grade. Experlogix CPQ brings it together with Elix, AI agents for setup, configuration, quoting and validation, and published MCP servers that let the AI platform you choose work directly with your rules.

We recommend a practical, phased course of action:

- In the next 30 days, map where your quotes stall or break, from engineering reviews to change orders, and baseline the scorecard measures described above.
- Over the following 30 days, codify and clean up the rules and data behind your highest-volume offerings, and set your policy for AI autonomy.
- By day 90, pilot one or two agent use cases in the tools your teams already use, such as quoting from customer emails and continuous validation of order changes. Measure the results, then expand.

To see Elix and Experlogix CPQ's AI agents work on your own complex offerings, contact Experlogix for a demonstration.

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