

WHAT REALLY MATTERS

When Your Quoting Process Breaks

It rarely happens all at once.

A few pricing errors slip through. A rep builds a quote from memory instead of the latest “approved” worksheet. Someone leaves, and the spreadsheet logic leaves with them. By the time anyone notices, the damage is already compounding.

The real costs aren't the mistakes. It's what you stop trusting.

When quoting breaks down, the first casualty is often speed, but confidence in the process isn't too far behind. Sales managers start second-guessing proposals. Engineers re-check BOMs. Finance runs shadow calculations because they don't trust the numbers coming out of the field.

Five Signals Your Quoting Process is Already Breaking

1 Only one or two people can build accurate quotes.

If your quoting process depends on institutional knowledge locked in someone's head, quoting gets less accurate and sales onboarding takes longer.

2 Pricing errors surface after the quote goes out.

Reps discover wrong pricing, missing discounts, or outdated product rules after the customer has already seen a number. Every revision damages customer trust.

3 Sales and engineering speak different languages.

The quote says one thing. The BOM says another. Production gets something in between. The gap between what's sold and what's buildable is where margin disappears.

4 Your approval process is either nonexistent or a bottleneck.

No governance means reps discount freely. Too much governance stalls deals for days waiting on sign-off. Neither extreme serves the business or the people selling for it.

5 You're quoting faster than you can deliver accurately.

Growth is supposed to be good news. But when volume increases and the quoting process doesn't scale, accuracy drops and you end up sacrificing speed due to rework.



What Actually Fixes This (And What Doesn't)

The instinct is to patch. Rebuild the spreadsheet. Add another approval layer. Hire someone who “knows the system.” Make sure all quotes are routed through (approved by) Martin, the quoting guru. These options feel productive in the short-term, but they don't offer a scalable, long-term path.

What actually works is centralizing the logic. Configuration rules, pricing governance, product constraints, discount authority; all of it needs to live in one place and be accessible to the people who need it.

What to Look for When You're Ready for CPQ

Not every CPQ platform handles these problems the same way. When you start evaluating, the differences that matter really boil down to:

- ✓ Which CPQ solutions handle your complexity needs?
- ✓ How does CPQ integrate into other systems and the rest of your business?
- ✓ How scalable is the software?

Native CRM/ERP Integration	Does it share your existing data model, or does it need middleware to talk to your systems? Every layer of translation could break when you need to update.
Rules-Based Configuration	Can business users maintain product and pricing logic without writing code?
Pricing	Does the system enforce discount limits, approval workflows, and pricing strategy automatically?
Downstream Accuracy	Does the quote generate a buildable BOM, a valid work breakdown structure, or a deliverable scope, not just an SKU and price list?
Adoption Reality	Will your reps actually use it? If it takes a bunch of workarounds to get the functionality you need, the tool adds complexity instead of removing it.

Experlogix CPQ is built for organizations that have outgrown spreadsheets, basic CPQ solutions and constant workarounds. Our solution delivers industrial-grade capabilities with native Dynamics 365 and Salesforce integration and a logic-based administration interface.

When you're ready to see what that looks like for your business: [Tell us how you quote today.](#)

