



Efficiently Creating Winning Quotations

Client

A Multinational Manufacturing Company

Project

Custom Product Configuration Quoting Tool

Highlights

- Created a customer-branded solution to deliver professional, accurate quotes based on fully customizable products with large numbers of options, helping sales people bridge the gap between their customer focused work and technology
- Drove new forms of business intelligence by allowing insight into products and product configuration analytics, creating new points of measurement for goods to be used in building product roadmaps and plans

What makes a quote successful? The accuracy? The price? The discount granted?

Client Challenge

During a series of upgrades and efforts to future proof their sales process, the client had a piece missing that was critical to their business. The ability to create quotes quickly and easily was one hurdle that had not been addressed. The capability to fully configure custom products and generate quotes from the products created has had reverberations all around the company. This key piece was paramount to the client's operations now and into the future. There were some challenges however in creating such a solution for products that have a seemingly infinite number of options:

- Creating a system that would prevent errors in product configuration
- Pulling that information into a professional customer-facing quote
- Building a platform that would be flexible enough to accommodate a changing product and price book
- Architecting an easy-to-use interface that would not seem overwhelming given the number of possible product configurations

Our Solution

- Constructed a product configuration solution that is extendable and can be easily managed
- Developed a user-friendly UI that displays the correct information at the correct time to make the massive amount of options manageable for users
- Created a quote generation tool to feed the results of product configuration into a professional and accurate quote, saving unnecessary manual creation time
- Established reports and dashboards around new data coming into the product configuration tool, allowing the client access to data that was never captured previously

Outcomes

- Sales users can now configure products and quote customers while on the phone with them, allowing the client to preform business at real-time speeds
- The client has seen an increase in revenue by being able to capture the customer's attention with the speed and agility of configuring a product and generating a quote instantly
- The new solution allows the client to now find hidden opportunities due to the intelligence and data they can report from the structured data created for generating quotes