



# CPQ Software Implementation: From start to finish

---



# Table of Contents

---

1. Introduction
2. So, you think you're ready for CPQ?  
Collaboration from Nikhil Karwal, Global Head of Practice,  
Salesforce Quote-to-Cash, Wipro and KBMax
3. Planning for your CPQ software implementation
4. Executing your CPQ project
5. Ensure success and drive adoption



# 1. Introduction

---

## What is CPQ software?

CPQ stands for “configure, price, quote” and utilising CPQ software allows you to do just that, in an automated way. By configuring product variations and pricing to enable automated quoting, CPQ creates a better buying experience for customers and a more seamless process for sales.

CPQ also opens up opportunities for sales and manufacturing to improve their efficiency and drive operational change in their organisation. What used to be done in days, weeks and months can now be done in minutes and seconds.

## Why is CPQ software essential to organisations looking to scale?

CPQ software reduces the time to deliver value for customers; they no longer need to go back and forth with a sales representative to learn about the ways products can be customised, or to get a customised quote based on their selections.

**It’s no mystery that CPQ has a major impact on customer experience, but what can it do for your organisation?**

**Let’s look at what it did for Wipro customer, Nationwide Fire Sprinklers:**



25% time saved each week in creating sales quotes. CPQ software took their quote cycle time from weeks to minutes



They experienced a 21% increase in quotes generated post-CPQ implementation



Since implementing CPQ they have seen a 20% increase in their customer base

**Now let’s look at what it did for KBMax customer, Merck:**



They experienced a 400% increase in quotes generated post-CPQ implementation



They saw a 150% decrease in errors post-CPQ implementation



CPQ software took their quote cycle time from 8-weeks to 10-minutes

**CPQ software can make a positive impact on your business outcomes and is essential to the growth and scalability of organisations.**

**Okay, you’re convinced. But, how can you get started?**

If you’re considering a CPQ software, knowing where to start is often the hardest part. That’s what this implementation guide is aimed at solving. Let’s get started...

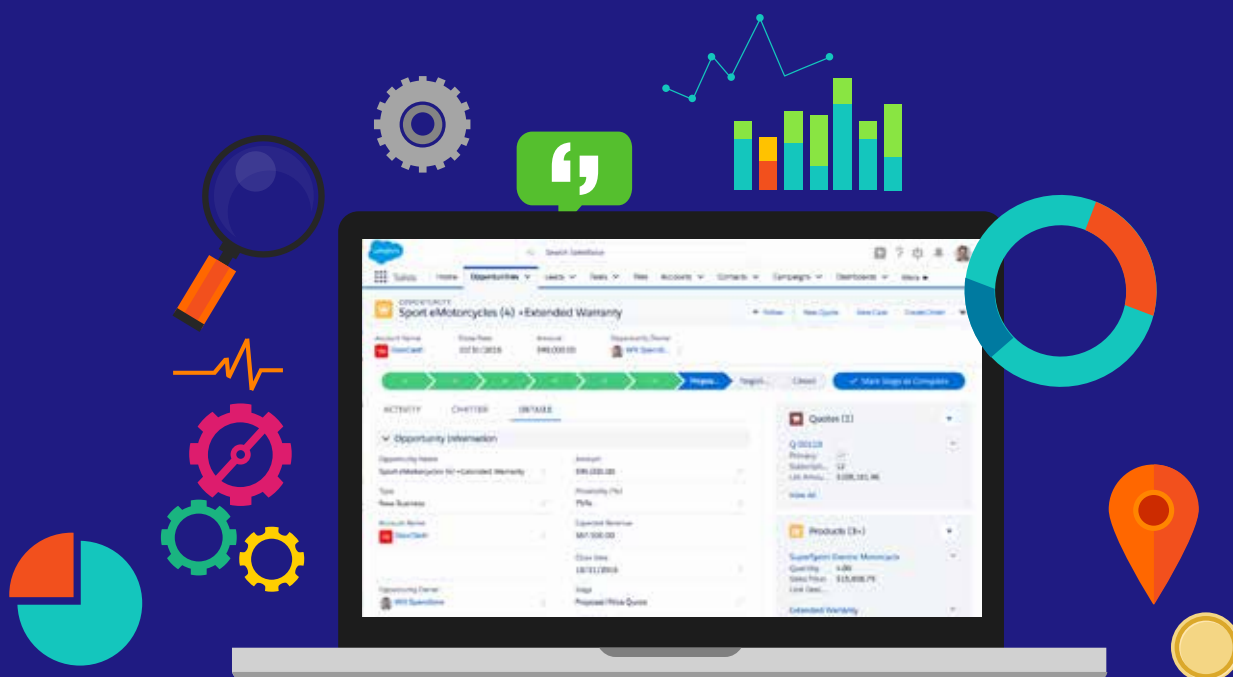
## 2. So, you think you're ready for CPQ?

Nikhil Karwal, Global Head of Practice, Salesforce Quote to Cash, Wipro, shares his approach to determining your enterprise's CPQ readiness.

“There is no one recipe for a successful CPQ implementation. It's a combination of understanding your own strategy, change management, processes, products and people. A lot of the companies I come across simply aren't ready. The advice we give is to start well before you purchase software and start by planning the project, not by buying the software.



There is a lot of planning that takes place in regard to financials, people, processes, and customer experiences.”



## Determine your CPQ readiness

Digital transformation takes time, change, resources and organisational alignment. If you're unsure whether you are ready to take on a CPQ implementation project, here is a framework of questions to answer and document before you start.

### 1. Identify and document your organisational goals and roadmap

- a. Where is the company heading, what's the short and long term strategy?
- b. What are the company's high-level goals, for example, restructuring, modernisation, mergers and acquisitions, IPO, or finding investors?
- c. What's your Organisational Change Management approach to this transformation?

### 2. Break down your organisation roadmap into processes

- a. How is your roadmap structured or phased and how does it align with your go-to-market strategy?
- b. How is your sales organisation currently structured?
- c. What's your channel strategy and structure, if any?

### 3. Map your processes in their current state

- a. What logic exists for your products or services, for both, internal sales and channel sales?
- b. What product configurations exist currently, for both, internal sales and channel sales?
- c. What's your sales process & structure to-be, based on your organisational strategy and roadmap?

### 4. Design an agile process for not just implementing, but embracing change and maintaining the CPQ solution

- a. What impact will CPQ make on roles, and your need for resources?
- b. What financial burn will be needed for up-keeping of the software and, yearly operational expenses?
- c. How will sales learn the new tools available to them and adapt to the new way of selling?
- d. How will new processes be formed and change management be handled?





While this is not a conclusive list of questions, documenting answers to the above questions will enable you to identify gaps in your CPQ readiness, and better prepare for the implementation process. Implementing technology is only as effective as the planning behind it. Karwal adds "If you miss any of these workstreams, then you're just configuring a tool. You're not really implementing a successful sales execution platform ready to transform your organisation, which is exactly what a CPQ system should enable you to do."

# 3. Planning for your CPQ software implementation

## Get buy-in from your team

It's not just essential for you to see the value; you'll need the help of your team to accomplish the project. That means that they need to be 100% sold on the idea of CPQ software impact on the business, and how it relates to their roles.

### Takeaway:

-  Identify gaps or friction points with your team that CPQ would solve; document them.
-  Get team members involved from the start of the software selection process.
-  Educate team members on the implementation process and timelines early.
-  Identify the implementation team who will help along the way.




## Get your leadership onboard

Sales and operational efficiency is a good thing for all; showcase to leadership how CPQ can make an impact on your company's bottom line.

### Create goals that cover:

- What business outcomes you expect from CPQ implementation
- Sales efficiency optimisation estimates post-implementation
- Estimates on cost savings due to decreased errors and mistakes

### Takeaway:

-  Identify a c-suite champion and get buy-in from executive leadership early, and often.
-  Ensure that you are given the time, people, and financial resources needed to complete the project and that your organisation is ready to make the investment.
-  Getting executive support is essential to any CPQ implementation project. The most common way we see companies fail is by not having the right levels of commitment and buy-in from executives prior to starting their project.



## Create a plan for who does what

You'll want to build an A-team of both technical, and non-technical team members who will help you during all stages of the CPQ software implementation process.

### Operations

#### Sales Leadership

- Provide insight into customisation needs.
- Interact daily with the customer and share insights.
- Establish common configuration needs.

#### Project Manager

- Set up all meetings, gather information, and manage timelines.
- Manage resources and budgets.
- Set up internal training for CPQ software use at their organisation.

#### General Support

- Maintain general support for customers, and support non-technical issues.
- Supports customer questions, and often knows common frustrations.

### Technical team

#### Project-based Implementor

- Implement the configurators at their organisation.
- Own technical support questions from customers.
- Bridge questions from operations and technical teams.
- Support the configurators after implementation.
- QA all development.
- Provide sales with technical support.

#### Support Engineer

- Own technical support tickets from operations.
- Own general support questions, transfer configurator specific support questions to project-based implementor or configurator author.
- Provide internal training.
- Maintain help files and support material.
- Help with QA for all development.

#### Business Lead

- Provide expertise on current business processes.
- Oversee daily operations and sales.
- Identify potential problems or inefficiencies in configurators based on business priorities.

**Takeaway:** Collaboration between your operations teams and your technical teams is essential to completing a CPQ software implementation.

#### You'll need operations to:

- Set timelines
- Gather customer insights
- Collaborate on variations and modification needs of customers
- Communicate sales needs, and speak on behalf of the customer

#### You'll need technical teams to:

- Ensure efficiency
- Create configurators that meet customer and prospect needs
- QA configurators

## 4. Executing your CPQ project



### Prepare documentation

Before starting any project, it is important to ensure that you have documentation prepared and ready. When it comes to CPQ implementations here is a checklist of everything you should have ready before you get started.

- ✓ All UI fields needed
- ✓ All data tables needed. If you have data-driven fields, ensure the data is clean and laid out correctly
- ✓ All logic needed for the configurator
- ✓ All pricing data for the configurator
- ✓ All templates needed ( Excel, Word) and examples of what you'd like the end result to look like

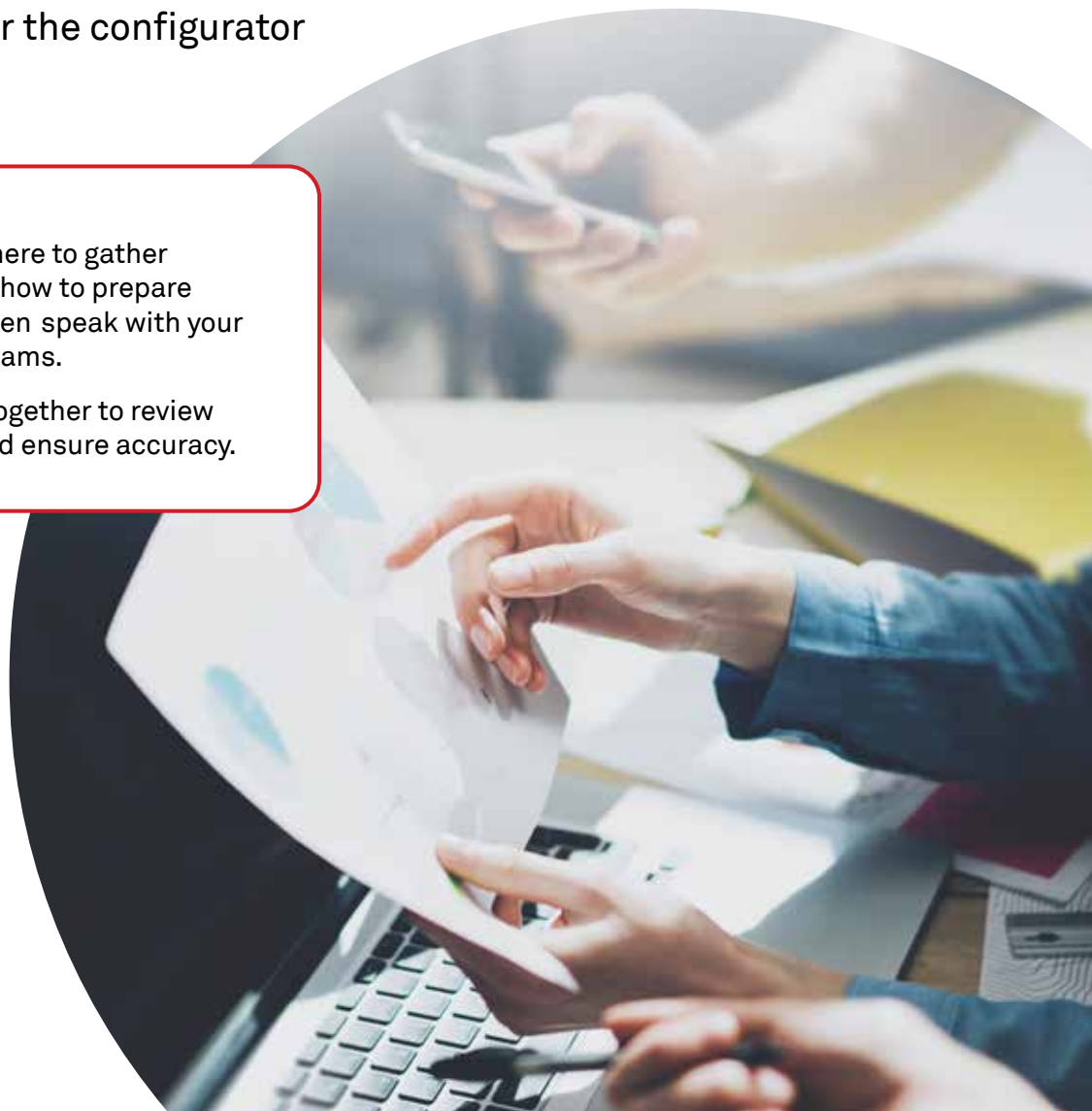
#### Takeaway:



If you're unsure where to gather the above data, or how to prepare documentation, then speak with your implementation teams.



Gather all teams together to review documentation and ensure accuracy.





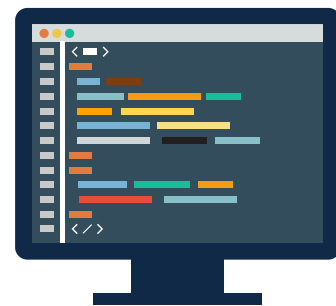


## Set-up environment

An environment is where your CPQ integration lives; it's essential to connect your business systems (such as Salesforce) to a CPQ software through API integrations. When setting up your environment, you'll want to provision access to all technical users involved in the project, and ensure they have the permissions they need.

## Set-up configurator back-end

Once technical leads have been given access to the environment they'll get to work on all of the logic required to make your configurator work. This includes writing the logic for the configurator and adding pricing logic to the configurator.



## Set-up configurator front-end

Create scenes, and establish what your customers will see when interacting with your visual CPQ software. This includes all front-end UI for customers.

## Set-up document outputs

You'll need to pre-determine what your quote documents and custom proposals will look like when sent to customers. You'll be able to do this when setting up your outputs. Create all templates, and ensure output fields are designated and rules are written that change them based upon customer inputs.



# 5. Ensure success and drive adoption

Implementing CPQ software is a big undertaking for your team—but the work isn't over there. You should place effort into driving adoption of the software and providing continuous maintenance to your CPQ programme.

## Train your teams

Sales team members, support team members, engineering, and finance all need a baseline of knowledge in CPQ. Break training into parts and train each team on what is essential for them in their role. This may differ based upon the role, but everyone needs training on how CPQ is used at your organisation.

## Maintain executive buy-in

Keep your c-suite champion in the loop well-beyond the implementation timeline. Their continued support will be essential in maintaining the resources that your CPQ software may need to remain successful.

## Measure and optimise

Pay close attention to the results you see from implementing CPQ software. If you notice opportunities to make the CPQ experience more seamless for customers, document them and make optimisations based upon feedback and challenges.

### Takeaway:



Create training processes for current, and new team members to learn CPQ.



Set-up regular meetings with your c-suite champion to discuss outcomes of implementation.



Document potential optimisations, and test them.

Expert advice from Nikhil Karwal

“You know sometimes you go out on a hike or on a holiday to escape things or clear your mind? Halfway through the hike or holiday, you forget why you started it. You fall into your daily routine, and you forget why you booked that holiday. By the time the holiday comes to an end you realise ‘wait, why did I book this holiday?’ Many times in implementations, we see that people forget why they started this transformation halfway through. They get consumed in the granular details and they forget why the project was begun in the first place. It becomes a tool, and no longer a strategy.

Our advice, don't forget why you started the programme. Keep reminding yourself, your people and your executives of the reasons why you started and the high-level goals of your programme.”



Wipro Limited (NYSE:WIT, BSE:507685, NSE:WIPRO) is a leading global information technology, consulting and business process services company. We harness the power of cognitive computing, hyper-automation, robotics, cloud, analytics and emerging technologies to help our clients adapt to the digital world and make them successful. A company recognized globally for its comprehensive portfolio of services, strong commitment to sustainability and good corporate citizenship, we have over 190,000 dedicated employees servicing clients across six continents.

Together, we discover ideas and connect the dots to build a better and a bold new future.