

Create, Maintain and Renew Customer Price Agreements

Creating and maintaining customer price agreements and ensuring profitable pricing within them now and in the future can be an amazingly challenging endeavor.

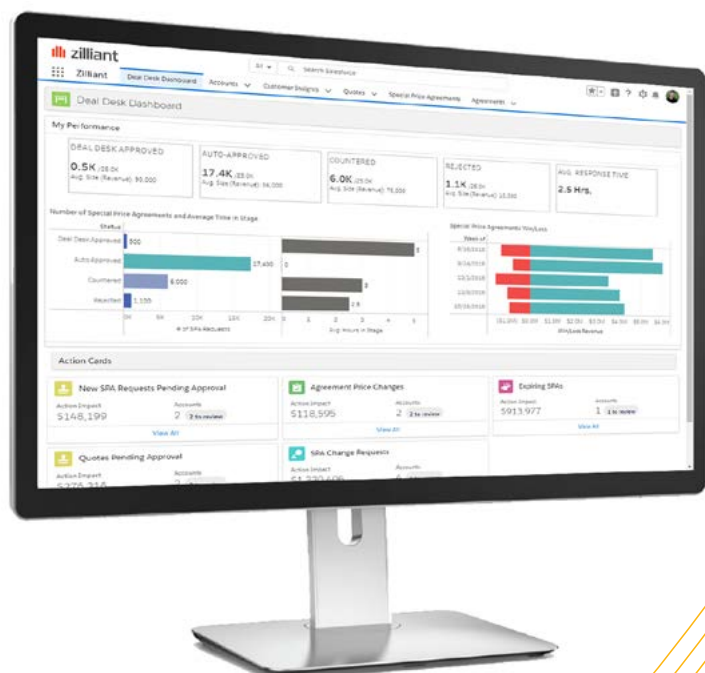
Housed across disparate systems in the company – spreadsheets, ERP systems, email, filing cabinet, or otherwise – it can be an impossible task to simply understand how many agreements exist in your business and how profitable they are (or aren't).

The proliferation and under-management of agreements have led to many situations where companies may have thousands of active customer price agreements, many of which fall victim to the “set and forget” conundrum. When pricing teams lack a proactive and scalable mechanism to communicate needed price changes on these agreements to sales teams, inefficient manual processes and margin leakage persist.

Furthermore, when agreements are up for renewal or customers fail to meet volume commitments, there is no alert system in place to prompt a discussion with the customer. Upon renewal, sales reps are often faced with the time-consuming task of manually updating hundreds or thousands of lines on a single agreement. Rebates further complicate this process, as sales reps often lack an easy way to enroll customers in rebate programs and a means to proactively track rebates for each customer.

- Create and manage customer price agreements and contracts
- Enroll customers in rebates and manage customer-specific rebate terms
- Ability to mass update agreement lines across multiple customers when paired with Zilliant Campaign Manager™
- Line item and deal level embedded analytics
- Agreement and customer relationship health indicators
- Workflow and approval
- Desktop and mobile accessibility
- Dynamic price guidance
- Seamless data and ERP integration

Zilliant Deal Manager™ streamlines the creation, management and approval of customer agreements, contracts and rebates, ensuring they don't become an inadvertent source of margin leakage — now and in the future.



zilliant DEAL MANAGER

HOW IT WORKS

CREATE

Sales reps or the deal desk can create net new customer price agreements and contracts, set up terms, add products item by item or from pre-defined templates, set prices using various supported price types, enroll customers in rebate programs, view profitability metrics at the line level and agreement level, and submit for any required approvals. Once an agreement is approved, sales reps can easily export agreement lines in a .csv format to share with the customer. New agreement prices can be easily synced to ERP systems via batch process or API.

MANAGE & RENEW

Configurable dashboard action cards alert sales reps when specific agreements need their attention or review. Whether an agreement is nearing expiration, a customer has failed to meet a volume commitment, or a pricing department is requesting price changes on specific agreement lines due to cost changes or other pricing objectives, sales reps are directed to which agreements are impacted. Updates can be made en masse across agreements in conjunction with Campaign Manager or agreement by agreement, submitted for approval, if necessary, and synced back to an ERP system. Action cards can also be configured to alert sales reps when customers are close to qualifying for a rebate. Sales reps can also modify customer-specific rebate terms and relate customer-specific rebates to agreements for a single view of the customer.

INTEGRATE PRICING AND SALES GUIDANCE

When powered by intelligent pricing, deal and cross-sell guidance, Deal Manager becomes key to connecting corporate strategic objectives to commercial decisions made by the sales team. The application can easily consume pricing and sales guidance generated from Zilliant Price Manager™, Price IQ®, Cart IQ® and Sales IQ® applications, or any other in-house or third-party sources. Action cards can be configured in Deal Manager to alert sales reps to specific pricing or sales initiatives on the dashboard and prompt action.

EMBEDDED ANALYTICS

Understanding why a price change is recommended, the health of the customer relationship, the status of a customer rebate, and the profitability of the agreement is key to equipping sales reps to make the best possible pricing decisions. Configured visual analytics can be dynamically embedded in Deal Manager to provide the additional context many sales reps are seeking when making pricing decisions.

WORKFLOW AND APPROVAL

Once an agreement is updated or created by a sales rep, Deal Manager can alert him or her when manager approval is necessary by automatically showing if the pricing meets profitability criteria. Managers have a simple interface showing them all the deals that need their approval, as well as supporting analytics to better understand the profitability of the agreement. They can approve or reject the agreements and send notes and feedback back to the sales rep, which are then immediately viewable by the sales rep within the application.

Deal Manager supports complicated workflow rules, email notification for approvals, mobile accessibility and audit trail requirements.

GET STARTED

We believe deeply in investing in customer success, starting with the first conversation.

Contact us today at www.zilliant.com/dealmanager

