

Configure Product Quote(CPO)
Implementation and Optimization
A path to quoting efficiency

CPQ Implementation Key themes

Design for optimal quoting experience

Areas of focus through the implementation journey

Sales User
experience

Analyze and optimize sales user experience for better adoption of CPQ.

Product
Strategy

Product layout, product strategies for pricing and selling and the role of CPQ.

Quoting
Efficiently

Implement and optimize CPQ for fast quoting. Identify bottlenecks for fast quotes.

Best Practices

Best practices for testing and long term efficiency and cost saving solutions.

CPQ Implementation Journey

Design for quoting experience



Your Goals

Get to know your goals, objectives, and challenges in order to co-create a strategy and plan of action.



Current business flow

Understand your current business process, product layout, dependencies and the role of CPQ.



Design and Artifacts

Evaluate and design your product structure, CPQ features, and automation.



Readouts

Collaborate and present road map, action plan and timelines ensuring clear understanding among stake holders.



Implementation

Experiment and put into action the roadmap. Track and report progress.




Configure Product Quote(CPO)

Assessment

Assessment Process

Assessment helps us identify areas of your sales process that have challenges and put together a plan to address them.

Discovery

 Create a business value map to align on your business objectives, business capabilities, business goals, challenges and expectations.

Build	Integration	Test	Deploy	Release	Operate
Define of building system or sub-system	Define of mapping of sub-system	Define of testing system solution	Define of systems delivery	Define of operation with user input	Define of monitoring program status & update
Define system architecture	Review and approve the integration system architecture	Management of test cases	Deployment planning and execution	Production and production to release management	Continuous log
System build execution script	Continuous deployment	Deployment	Deployment management	UAT	UAT
Building system solution	Integrating system solution	Validating about design, performance, operation	Deploying system solution	Monitoring system in a pilot and complete rollout	Monitoring system in a pilot and complete rollout

Interviews



Gather qualitative insights through stakeholder interviews.



Insights on your user experience and productivity



Analyze platform challenges and impact on CPQ.



Plan & Readout



Recommendations

 Recommend changes based on assessment and provide best practices.

Roadmap

 We provide a roadmap with prioritized items in an action plan.

Configure Product Quote(CPO)

Implementation and Optimization

Solution

CPQ implementation takes inputs from the assessment phase to tailor it your business requirements.

Opportunity Management

Optimize the process by which opportunities are created, qualified, configured, priced, quoted, negotiated and closed.

The screenshot shows the Salesforce interface for an Opportunity titled "Software and Support". The header includes the opportunity name and a crown icon. Below the header, key fields are displayed: Account Name (Edge Communications), Close Date (7/1/2022), Amount (\$1,298.00), and Opportunity Owner (Admin User). The main content area has tabs for "Related" and "Details", with "Details" selected. The details section shows a table of fields: Opportunity Owner (Admin User), Amount (\$1,298.00), Private (checkbox), Expected Revenue (\$973.50), Opportunity Name (Software and Support), and Close Date (7/1/2022).

Account Name	Close Date	Amount	Opportunity Owner
Edge Communications	7/1/2022	\$1,298.00	Admin User

Field	Value
Opportunity Owner	Admin User
Amount	\$1,298.00
Private	<input type="checkbox"/>
Expected Revenue	\$973.50
Opportunity Name	Software and Support
Close Date	7/1/2022

The screenshot shows the Salesforce Product Selection interface. It features a search bar with the text "Search Products" and a list of products. Each product row includes a checkbox, a product code, a product name, and a product family.

PRODUCT CODE	PRODUCT NAME	PRODUCT FAMILY
<input type="checkbox"/> ADMINHOUR	Admin Hour	Support
<input type="checkbox"/> CLOUDSTORAGE-ENT	Cloud Storage Enterprise (TB)	Software
<input type="checkbox"/> CLOUDSTORAGE-STND	Cloud Storage Standard (GB)	Software
<input type="checkbox"/> CONFERENCETOOLLM	Large Meeting Conference Tool Organization License	Software
<input type="checkbox"/> CONFERENCETOOLSM	Small Meeting Conference Tool User License	Software
<input type="checkbox"/> CONSULT	Consultant Hours	Support
<input type="checkbox"/> CREATE	Creative Suite	Software
<input type="checkbox"/> DESKTOP	Desktop Computer	Hardware
<input type="checkbox"/> EXSSD10TB	External SSD Hard Drive 10 TB	Hardware

Product Management

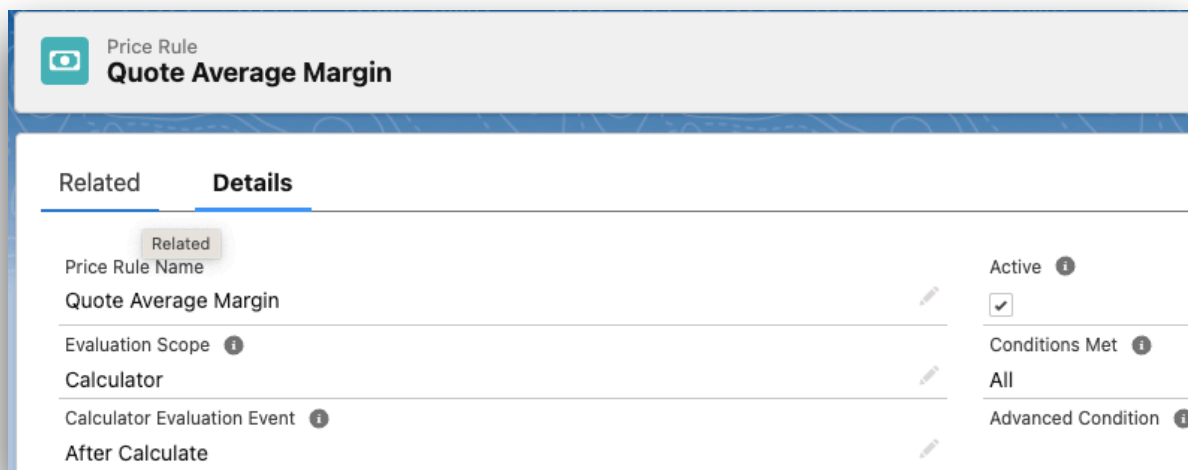
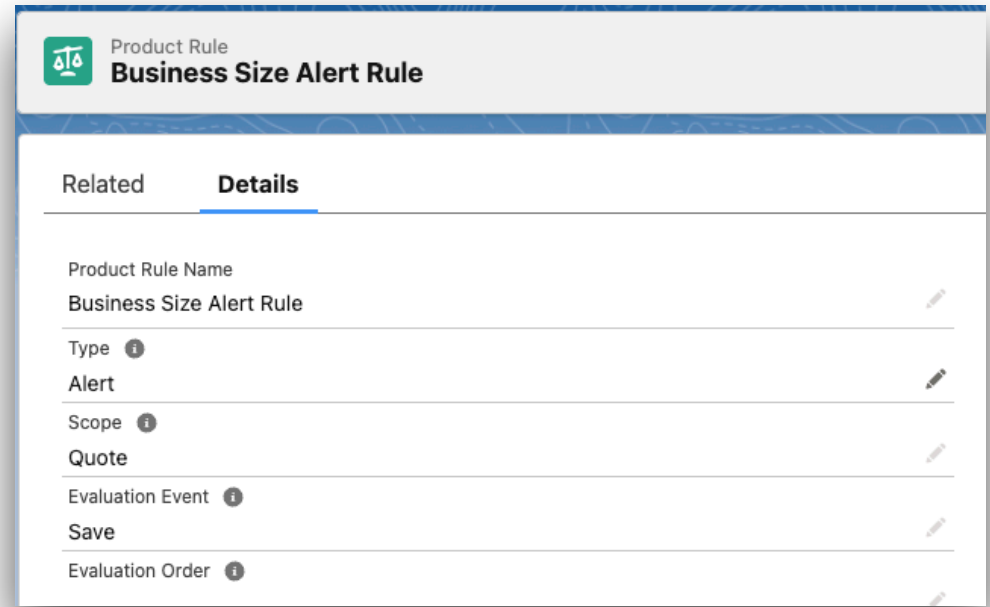
Plan and organize your products to be CPQ ready with product bundles, product options, and searchable.

Implementation Process

A **sample** list of capabilities

Setup Product Rules

Make quoting fun with bundles, options and product options in bundles. Create rules based on business sizes and lot more..



Setup Pricing Rules

Create rules for automated price field calculations based on conditions. Prevent pricing errors and create consistently priced quotes.

Quoting

Create quotes with accurate pricing with any given product configuration.

Contracts

Got subscription products? We can create automatically create contracts for them.

Quote Preview

San Francisco, CA 94105 Phone: Email:	Expires On: AM 6/8/2021
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Prepared For: Edge Communications 312 Constitution Place Austin, TX 78767 USA Austin, TX	Prepared By: Admin User axjacob1@gmail.com
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QTY	PART #	DESCRIPTION	UNIT PRICE	EXTENDED
10.00	CLOUDSTORAGE-ENT		\$2,000.00	\$2,000.00
10.00	CLOUDSTORAGE-STND		\$20.00	\$2,400.00
10.00	DESKTOP		\$5,000.00	\$50,000.00
10.00	FIREWALL		\$2,400.00	\$24,000.00
1.00	EXSSD10TB		\$230.00	\$230.00
			TOTAL:	\$78,630.00

Please fax a signed copy of this SO and other referenced documents to and mail two sets of originals to:

Approvals

Make it easy for sales executives to get their quotes & contracts approved with advanced approval workflows

Preview Document	Generate Document	Preview Approval	Submit for Approval
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Quoting Experience

Boost productivity and speed

Sales executives having a good experience using the CPQ leads to productivity improvements and better adoption of the process.

Experience booster

- Salesforce platform optimizations.
- CPQ rules optimizations for user experience.
- Product layout optimizations



Experience comes from good design, application performance and usability.

Best Practices

Throughout the sales optimization process we compile best practices based on assessments, execution and optimizations. These best practices will help you keep your implementation at high levels of efficiency and cost savings.

- Cost efficiency best practices
- Platform efficiency best practices
- Testing tools and services
- User experience
- Performance



About
UNIFICIENT

Why Unificient for your CPQ implementation

Going beyond functionality

Creating value for you with complete solutions



Big picture

How the long-term implications of our solutions help you achieve your goals.



Your goals

Provide effective solutions for your goals and objectives.



Cost saving

Cost efficiency in every design and implementation.



User Experience

Efficiency, people's experience and your business scale are our priorities.

Our Mission

Share our learning to empower our customers to provide exceptional experiences to their employees and customers.

Our Goal

Go beyond functionality to deliver exceptional experience, growth, and cost efficiency to our customers.



Our values

Trust is our #1 value. Business with integrity, innovation and the drive for customer success are our core values.

Expertise

Over 15 years working on the Salesforce platform. More than a decade as a Salesforce employee.

1% pledge

We are excited to be part of the 1% pledge and give %1 of our time in serving our community.



Email: scale@unificent.com
anil.jacob@unificent.com

Website

www.unificent.com/s/contactus

LinkedIn

www.linkedin.com/company/unificent/