

CPQ IMPLEMENTATION FOR INTELLIGENT PRICING & QUOTING

Optimizing product configuration, pricing logic and
sales workflows



ABOUT THE ORGANIZATION



- **Mission / Focus Area:** Sales-driven organization focused on product configuration, pricing and efficient quote-to-cash processes across regions.
- **Size of Organization:** Mid to large-sized enterprise with 200+ sales representatives, handling high-volume quotes and multi-product deals across geographies.
- **Key Programs:** Product configuration and pricing, quote generation, discount and approval management, contract lifecycle management and sales performance tracking.
- **Tech Stack Before Implementation:** Spreadsheets for pricing and quotes, manual approval via emails, legacy CRM or basic systems, disconnected ERP for order processing and no centralized CPQ system for pricing and configuration management.

CHALLENGES

- **Manual and Time-Consuming Quote Creation:** Sales teams relied on spreadsheets, leading to delays and inconsistent quote generation.
- **Inconsistent Pricing and Discounting:** Lack of standardized pricing rules resulted in errors and uncontrolled discount approvals.
- **Fragmented Systems and Poor Visibility:** Disconnected CRM and ERP systems made it difficult to track deals, approvals and quote status.
- **Inefficient Approval and Deal Closure Process:** Manual approval workflows caused delays, reducing sales speed and impacting conversion rates.
- **Lack of Standardized Product Configuration:** Absence of guided configuration led to incorrect product combinations and rework.



SOLUTION



Product & Pricing Configuration

Configured products, price books, list pricing, block pricing and discount tiers to standardize pricing across offerings.



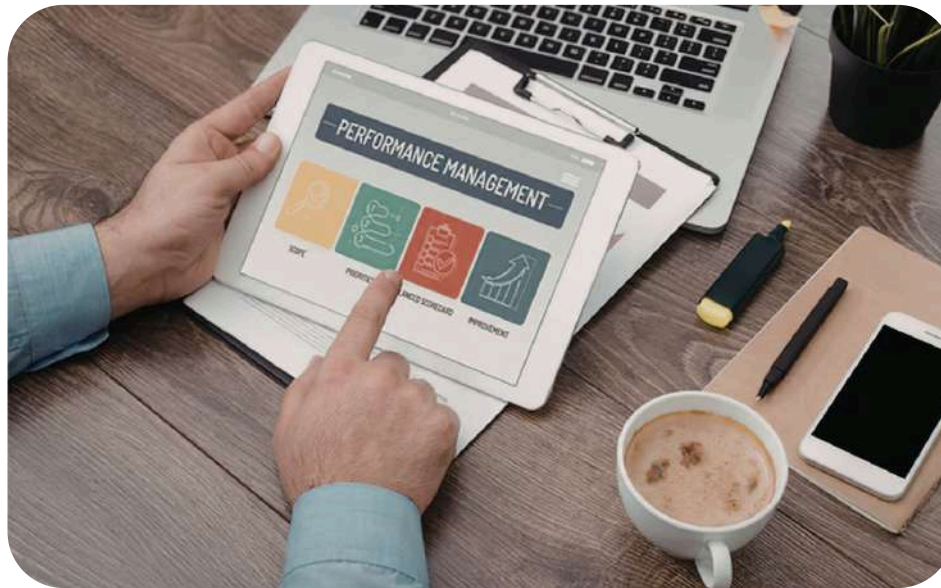
Advanced Pricing Logic

Implemented price rules, discount schedules, contracted pricing and summary variables for dynamic and accurate pricing calculations.



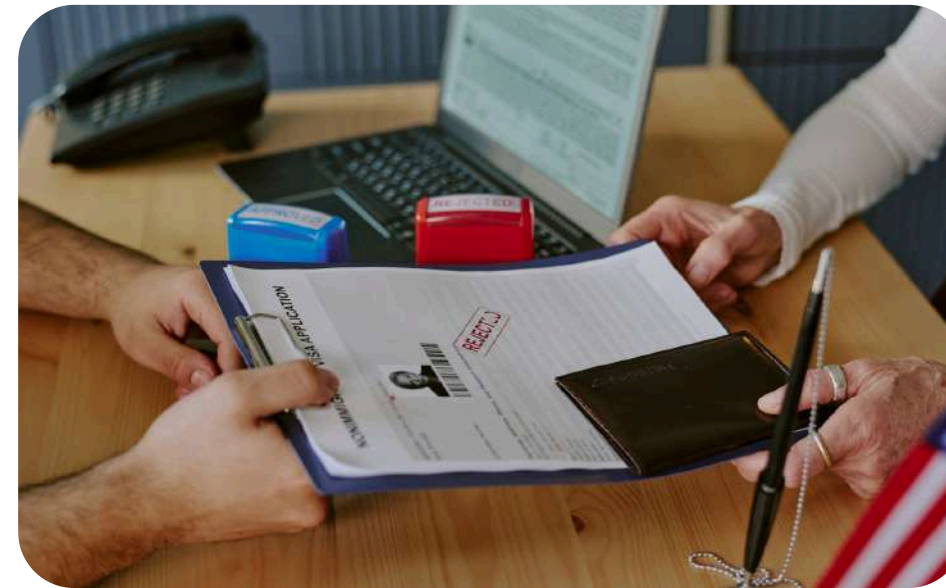
Controlled Product Selection

Enabled rules, constraints and automation to ensure accurate and controlled product selection and configuration



Quote Management Setup

Configured quote templates, quote line configuration and multi-dimensional quoting for structured and scalable quote generation.



Approval & Discount Governance

Implemented automated approval processes to control discounts and ensure pricing compliance.



Quote-to-Order & Contract Execution

Enabled conversion of approved quotes into subscriptions, contracts and assets for streamlined post-sales processing and lifecycle management

IMPLEMENTATION APPROACH



Discovery & Requirements

Gathered and analyzed requirements, evaluated pricing models, product configurations and defined the CPQ solution approach.



Solution Design & CPQ Configuration

Designed a scalable CPQ architecture enabling product bundling, pricing, approvals and quote generation, with validations and automation to ensure accuracy and consistency.



Integration

Integrated CPQ with ERP, payment systems and communication tools for seamless data flow and real-time updates.



Data Migration

Migrated product, pricing, customer and historical quote data with ensured accuracy and consistency.



Testing & Quality Assurance

Conducted system testing and UAT to validate pricing logic, workflows and integrations.



User Training & Go-Live

Delivered user training, ensured smooth deployment and provided post-go-live support for adoption.

KEY FEATURES DELIVERED



- **Automated Quote Generation:** Fast, accurate quote creation using predefined templates.
- **Guided Product Configuration:** Rule-based configuration ensuring valid combinations.
- **Dynamic Pricing & Discounting:** Automated pricing, discount tiers and approvals.
- **Streamlined Approval Workflows:** Multi-level approvals for better control and faster closure.
- **Subscription & Contract Management:** Support for recurring billing and contract lifecycle.
- **Quote-to-Cash Integration:** Seamless flow from quote to order, billing and invoicing.
- **Reporting & Analytics:** Insights into sales performance, pricing and conversion rates.

RESULTS

- Reduced quote creation time by 60%, transforming hours of work into minutes
- Accelerated approval cycles by 50%, enabling faster, same-day decision-making
- Eliminated pricing errors by 70% through automated rules and validations
- Improved sales productivity by 45% with a streamlined quote-to-cash process
- Increased operational efficiency by 40% via centralized and automated CPQ workflows
- Boosted deal conversion rates by 30% with accurate pricing and quicker response times





CONTACT US

Empower your sales operations with intelligent pricing, faster quoting and scalable CPQ solutions. Let's transform your quote-to-cash journey together.



Email

info@cloudcertitude.com



Website

www.cloudcertitude.com



Mobile No.

[+91 8130970706](tel:+918130970706)



LinkedIn

[LinkedIn Connect](#)

