

A close-up photograph of a person's hands typing on a laptop keyboard. The laptop is silver and open, with the screen displaying a blurred image of a building. The person is using a white mouse. The background is a bright, out-of-focus window with a view of a cityscape. The overall color palette is light blue and white.

3 Ways to Simplify Quoting for Complex Products

*How to leverage CPO
and eliminate complexity*

Model **N**

Modern CPQ excels at streamlining the quoting process

Once reserved for only the most complex manufactured products, Configure Price Quote (CPQ) solutions have become a mainstream extension for cloud-based CRM. Often built directly on a CRM platform, these solutions have been widely adopted as a sales enablement tool to help streamline the “opportunity to quote” process. Companies adopting these solutions are often less concerned about managing complex product configuration, and are focused more intensely on the benefits the CPQ solution can offer in shortening quote generation and approvals, and in enabling sales teams to increase sales through embedded recommendations that drive more up-sell and cross-sell.

Complex product configuration requires some key features

Businesses with complex configuration challenges should pay attention to both the powerful enablement capabilities that streamline the sales process, and the robust configuration capabilities needed to simplify product and pricing complexity.

Simplifying complexity is critical for sales, but also for administrators and the product organizations. Here are three critical capabilities of a solution that should be optimized to handle complex, enterprise-grade configuration.

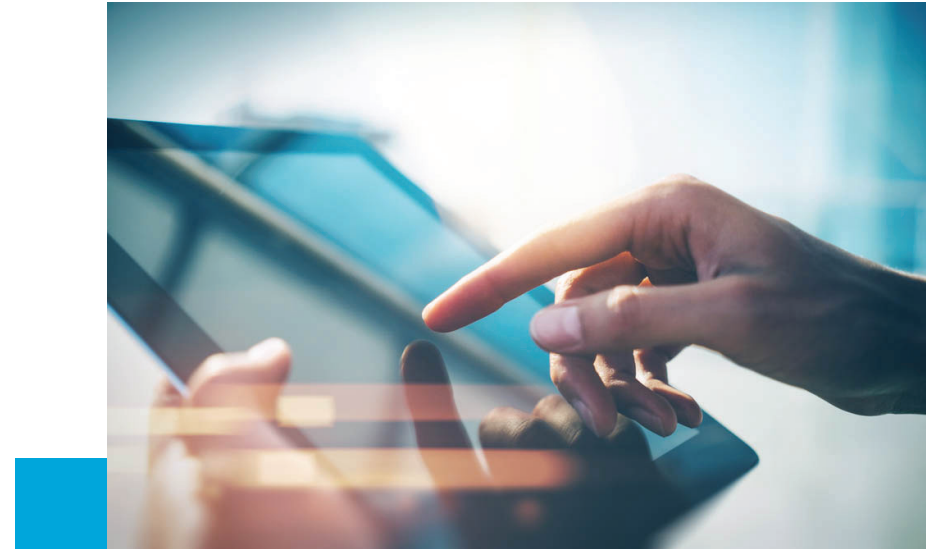
**Most CPQ
solutions are more
like a PQ solution**



1. Stop configuration errors before they happen

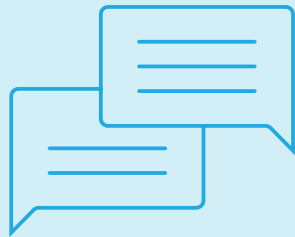
Most CPQ solutions will indicate when a configuration error has been made, but errors still waste valuable time and create frustration on the part of sales users. Often lightweight solutions also force users through a prescribed configuration path during the quoting process. To stop errors before they happen look for these capabilities:

- Enable configuration to start at any point and from any option
- Only allow for valid options to be selected based on current configuration
- Show unavailable options to help sales make corrections

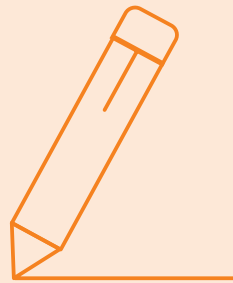


2. Show sales people the path to the configuration they want

When configuration errors occur, it is often a long and frustrating process for sales people to determine why there is an error and how to get to the configuration they need. Particularly for complex products with many options, sales needs help in determining how they can create particular configurations that meet their customer's requirements. An enterprise-grade CPQ solution will help sales people by offering suggestions on what to change.



Provide explanations
for all unavailable
options



Highlight what
needs to change
for the option to be
made available



Make it easy to
access all options
on a single page

3. Guide sales to solutions based on customer needs

In addition to simplifying the configuration process, a CPO solution can help lead the sales person to optimal configurations designed for a particular customer segment or to meet a specific customer need. Often referred to as “Guided Selling”, this capability in a CPO solution can be extremely powerful by leveraging customer inputs to lead the sales person to pre-configured packages including products and services.

Guided selling is also a powerful tool for promoting specific configurations or packages and bundling solutions together to drive increased sales. An enterprise-grade Guided Selling capability should include:



Easy to follow questions or prompts to define the solution package



Ability to alter the recommended package to further customize the quote



Embedded recommendations for up-sell and cross-sell

Southern States simplifies quoting for complex manufactured products

Southern States serves the electric utilities industry with a focus on innovation. They are the world's largest manufacturer of high-voltage disconnect switches. The company sells their complex configured products direct and through distribution partners.

**Over 250,000 SKUs
with combinations
of almost 20,000 for
some products**

The company implemented Salesforce CRM and then moved forward with an initiative to simplify their quoting process, which used to take as much as 10-12 days to complete manually. Most Salesforce-native

CPQ solutions were quickly eliminated because Southern States needed an enterprise-grade configuration capability due to the complexity of their products.

They implemented Model N CPQ and now most configurations are done in 20-30 minutes. The solution greatly improved response time to distribution partners and has been extremely valuable in bringing new sales people up to speed quickly.

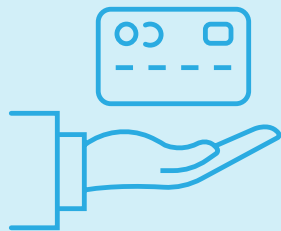
[Watch this video](#) with Southern States as they discuss how they use CPQ to simplify complex configurations.

An enterprise-grade CPQ solution, good for the entire company

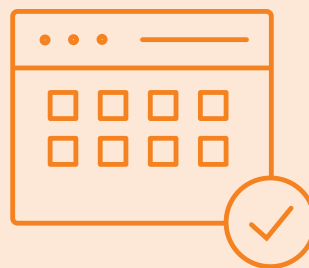
Simplifying the complexity in quoting complex configured products extends across many functions in the organization. Not only is it critical to evaluate how effective a CPQ solution will be for the sales organization, it's also critical to understand the way the solution will simplify the process for systems administrators and product managers.

Many CPQ solutions use rules-based configuration engines that require explicit rules for every inclusion and exclusion in a configuration. That can become a maintenance and testing nightmare to ensure that the CPQ solution delivers accurate quotes. In addition, all those rules often need to be optimized to ensure high performance and many basic CPQ solutions suffer from slow response times with complex configurations.

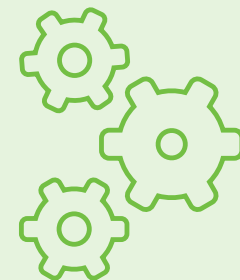
Look for these capabilities that will simplify complexity for systems administrators and product managers working behind the scenes.



Declarative rules to reduce the need to write explicit rules for every combination



Attribute-driven system to enable single rules to apply to multiple products



Automated rule firing optimization to eliminate the need to manually optimize rules

Find out how an enterprise-grade CPQ solution can simplify your sales process

Model N has developed a Salesforce-native CPQ solution that is focused on delivering the critical capabilities necessary for simplifying configuration for complex products. Designed with the needs of both sales and those who are behind the scenes that support the CPQ solution, Model N CPQ brings the “C” back into the modern cloud-based Configure Price Quote (CPQ) solutions.

End-to-end — With Model N CPQ the entire quote-to-order or quote-to-contract process is fully automated. Powerful configuration aids along with Guided Selling simplify the quoting process and ensure fast and accurate quotes. Proposals and contracts are automatically generated and can be shared using standard MS Word or PDF files, and the approvals process is fully automated and mobile enabled.

Robust and Interoperable — With Model N, rule writing is minimized and tools are provided to help make quick and transparent changes such as adding

new products or options without changing models. Model N is fully interoperable with ERP order management and can leverage Sap pricing and configuration rules without any conversions.

Performance and Scalability — Model N uses an advanced Salesforce-native architecture that bypasses Salesforce platform limitations to handle large, complex configuration models, and performance engines to ensure a fast response to 1000’s of sales users.

For more information or to watch a product demo go to www.modeln.com



Model **N**