

A hand is shown holding a smartphone. The phone's screen is overlaid with a semi-transparent blue layer. On this layer, the word "salesforce" is written in a white, lowercase, serif font. Above the text, there is a grid icon with a large "X" over it. In the top right corner of the blue overlay, there is a small grey square and a blue square. The background is dark and out of focus.

4 reasons why

adding Excel is better than
customizing Salesforce CPQ

Model **N**

Add Excel to a CPQ Solution?

Most people implement CPQ solutions to eliminate spreadsheets! CPQ solutions simplify and streamline the quoting process. They make the most relevant and up-to-date information easily accessible. And they eliminate errors in configuration and pricing.

25%

shorter sales cycles
when using CPQ

So why would you ever consider keeping those old spreadsheets around when you have or are considering a CPQ solution? Because even with a cloud solution, companies are always tempted to CUSTOMIZE!

An Everest group study showed that among leaders in SaaS implementations, 42% of revenues were for consulting and customizations. This gets even more problematic with flexible platforms like Salesforce, where modifications, extensions or additions of custom objects often seem straight forward in concept. But there are always challenges to consider:

- The hidden on-going costs of maintenance
- Flexibility when it comes to future change
- Added cost of implementation
- Added retesting effort of the customizations after application upgrades
- Appropriateness of the standard Salesforce Visual Force UI to the process

At Model N we appreciate the configurability of the Salesforce platform, our apps are Salesforce native, but here are 4 reasons we think it's better not to customize your Salesforce CPQ and add Microsoft Excel to Salesforce CPQ instead.

1. When it's actually easier to use Excel for large, multi-line quotes

There are a lot of benefits in having a consistent, friendly, mobile ready user experience, but sometimes the configuration, pricing and quoting process can become very cumbersome on a VisualForce page. In particular, we have seen companies that have large quotes with more than 200 lines, sometimes up to 2000 line items. In such cases users struggle with the Salesforce CPQ UI to make changes and adjustments across a long list of quoted products. Extending Salesforce CPQ with Excel improves quoting:

- Providing a quick way to review and edit a large amount of quote line data
- Offering an easier approach to mass updates or to apply formula based changes
- Let sales reps work in a familiar application to add their own analysis and formulas for simulation and manipulation of quote data



2. When doing complex “what-if” or deal modeling scenarios

As companies transition their sales teams to solution selling, putting together winning quotes goes beyond ensuring accurate configuration and pricing. Modern CPQ solutions bring a lot of value with guided selling, recommendations and sales analytics that help put together solutions that meet customer needs and maximize revenues.

However, companies are beginning to offer many creative ways of packaging solutions with different metrics for payment, leasing or financing options, and consumption based models. Implementing these innovations as custom logic in Salesforce CPQ can add quite a bit to the implementation cost. Beside cost, here’s why you should consider extending Salesforce CPQ with Excel:

- Make it easier for pricing, finance and product managers to manage models
- Reduce training time for salespeople using the analysis templates
- Faster time to market for changes and new approaches by simply upgrading Excel templates



3. When moving or modifying large data sets to support the Salesforce CPQ solution

Salesforce administrators are often tasked with extracting or uploading large amounts of data between Salesforce and other systems. Often the data driving a CPQ solution can be complex and quite extensive. Making modifications to catalog and pricing data can be tedious using a standard Salesforce VisualForce page. Consider leveraging an integrated Excel approach when:

- Need to extract and modify records en masse from CPQ
- Migrate data into Salesforce CPQ from other applications
- Filter, sort, and data comparisons need to be performed on the fly



4. When there is a need for off-line processing

It's becoming a connected world and it's even more so with mobile devices and mobile enabled CPQ. Yet, we still come across situations when it's necessary to enable offline capabilities for sales teams. Systems integrators can probably build out custom solutions to enable some form of offline quote and sync capability, but why not leverage an off-the-shelf solution?

An Excel template from Model N's X-Data for Salesforce CPQ can be used off-line, and the templates can connect to any object in Salesforce. That means you can use Excel for a variety of off-line tasks:

- Quote analysis and modeling
- Forecasting
- Updating opportunities



Model N X-Data automatically extends Salesforce CPQ with Excel

Whether you are in Sales, Marketing, Operations, Finance or IT, chances are good that you rely on Excel for some key tasks. Model N X-Data blends the two worlds of Salesforce and Excel by connecting Excel templates to any Salesforce object.

Excel is one of the
most widely used
apps ever

Model N X-Data templates are Excel worksheets that are quickly authored in Excel using an easy template builder that plugs into the Microsoft Excel toolbar. The X-Data templates enable CPQ users and admins to securely export, analyze, modify and load data between Excel and Salesforce according to access controls and data validations defined in Salesforce.

X-Data automatically ensures that the latest templates are being used and synchronizes with Salesforce to ensure that changes to records are identified and any issues or conflicts flagged for the user to correct.

The Salesforce CPQ quoting process can be easily extended with X-Data Excel templates to manage massive multi-line quotes, do deal modeling or enable off-line manipulation. CPQ administrators will love the added flexibility and ease of use for managing CPQ master data.

And it's an easy, add-on application for Salesforce CPQ that can be quickly installed with minimal effort and training.

Cut the costs and challenges of CPQ customizations with Model N X-Data

Learn more at www.modeln.com



salesforce®

Model **N**