

A close-up photograph of a person's arm wearing a black sports watch, with their hand holding a black pen over a tablet device. The background is blurred, showing other people in a meeting or office setting.

Successful 'Configure-Price-Quote' (CPQ) Deploying takes planning and organization

01 Lack of Involvement in CPQ Implementation

CPQ is a major migration, and can be very different depending on your industry: Communications, Media, Hospitality, Healthcare, Manufacturing, Finance, or Energy. When an organization has made the decision to deploy CPQ (Configure-Price-Quote) they have considered many factors including integration with the existing systems: CRM, ERP, & Billing.

The selection of the CPQ solution is challenging in its own right, and you NEED to select the right deployment & support team to have true success. Once the selections have been made the planning stage go into effect.

I have outlined the 4 Key areas that are important for organizations to successfully implement your CPQ solutions.

4 CPQ Implementation Challenges & Solutions

01. Lack of Involvement in CPQ Implementation.
02. Quality Data in the Systems
03. Service & Product Focus
04. Deployment Team

02 Lack of Involvement in CPQ Implementation

CPQ is an integral part of an organization and handles the order form LEAD-to-CASH and touches many divisions within your Enterprise. It is important to have the C-Level and Leadership supporting the Digital Transformation to CPQ platform. There should be support & buy-in from most if not all divisions of the organization. When planning it's important that the 6 key roles are in place for a smooth transition:

- Project Manager – Lead Delivery Manager that insures the project stays on schedule.
- Solution Architect – Analyzing & developing the best process & flow of the systems.
- Technical Architect – The Engineering ‘Guru’ that is designing the system.
- Architecture Developers – Develop the plan design from the Technical Architect
- UI Developer - ‘Look-&Feel’ and user-experience.
- Business Users – people who will actually use the system and who know for sure what are their expectations.

The important elements to include are the ‘Other Applications,’ that its integrating with as well as the DATA migration. The CPQ system has many options and can be configured in many manors.

The CPQ system will work closely with the Catalogue (Library) of products or services that has designated pricing. Pricing options can be challenging, and in some instances are not readily available. Its key to have the finance department involved in this project.

Many organizations are unsuccessful in their CPQ implementation because they may only be utilizing Sales & Marketing. Departments such as: Finance, IT, Product Management, Engineering, Support, and various other departments need to be involved for successful CPQ deployment.

Not only are division leadership important, but C-level & Upper-management sponsorship is crucial for success to bring the system “LIVE” in your organization.

6 key roles are in place for a smooth transition

01. Project Manager

02. Solution Architect

03. Technical Architect

04. Architecture Developers

05. UI Developer

06. Business Users

03 Quality Data in the Systems

Healthy systems is like healthy lifestyle, you can't eat 'JUNK FOOD' and expect to be in great health. CPQ solution can only be as successful as the data that is put into the system. There should be a process for migrating accurate data, and a process for inputting data once the system is up and 'LIVE.' It is important that the DATA is:

Up to date – Accurate – Clean

Migration of the correct data is important considering all of the factors that go into order:

Configuration – Design – Bundle – Price – Quote – Provision – Rate – Bill

The more the data is not accurate the more challenging it is to be successful, profitable, speedy, & improve customer retention.

Proposals generated by the system should be Time/Date stamped to be sure bundles, items, products, parts, etc are quoted correctly.

There should be a process to keep data clean, updated, maintained through implementation and post 'Go Live.'

Factors that go into order:

01. Configuration

02. Design

03. Bundle

04. Price

05. Quote

06. Provision

07. Rate

08. Bill

04 Service & Product Focus

To complete a sale there are many steps that need to be accomplished to sell a product or service in CPQ. The Product Catalog is an important element to a successful CPQ platform working.

Not only is Catalog important in a CPQ deployment, but understanding concerns such as: Financing, Delivery, Subscription based payment plans, Maintenance, & Training can all be parts of the sale. Depending on what your product or service is, there can be challenges with a non-physical/tangible item. Product Management is instrumental in helping define the product/service to help confirm what is included in the sale.

The bottom line is that CPQ needs to be planned in a Phased Deployment plan.

Potential parts of sale:

01. Financing
02. Delivery
03. Subscription based payment plans,
04. Maintenance, & Training

05 Deployment Team

Remember when Spain's Soccer Team passes the ball more than any team in the Worldcup history it's a team effort that leads to success. Many times CPQ customers feel they can stand up the platform, but it takes a strong TEAM approach from the Deployment Team to have all of the functionality to improve the business.

Deployment Plan may include these Phases:

Phase 0 – Planning Phase of Client Environment & CPQ Deployment Team

Phase 1 – Preparation of Systems/Customer Staff

Phase 2 – Data Migration Plan

Phase 3 – Integration & Testing

Phase 4 – Go Live

Phase 5 – Support

Deployment Plan may include these Phases:

Phase 0 – Planning
Phase of Client
Environment & CPQ
Deployment Team

Phase 1 – Preparation
of Systems/Customer
Staff

Phase 2 – Data
Migration Plan

Phase 3 – Integration &
Testing

Phase 4 – Go Live
Phase 5 – Support

06 Summaries

Any innovation requires extraordinary team efforts as the tool is great only when it's used and highly appreciated. Each company should make sure there is a proper time set for user on boarding phase as after all, CPQ was developed to make people happy and productive.

I often like to think of the 5 P's with deployment Proper Preparation Prevents Poor Performance. Remember this and your migration will bring tangible results very soon!

-- Jonathan Mannion – Excelacom

5P of Deployment

Proper
Preparation
Prevents
Poor
Performance

07 Contact us

Website: www.excelacom.com

Jonathan Mannion

Email: mannion@excelacom.com

Phone: +1.858.444.7439

<https://www.linkedin.com/in/jonathan-john-mannion>