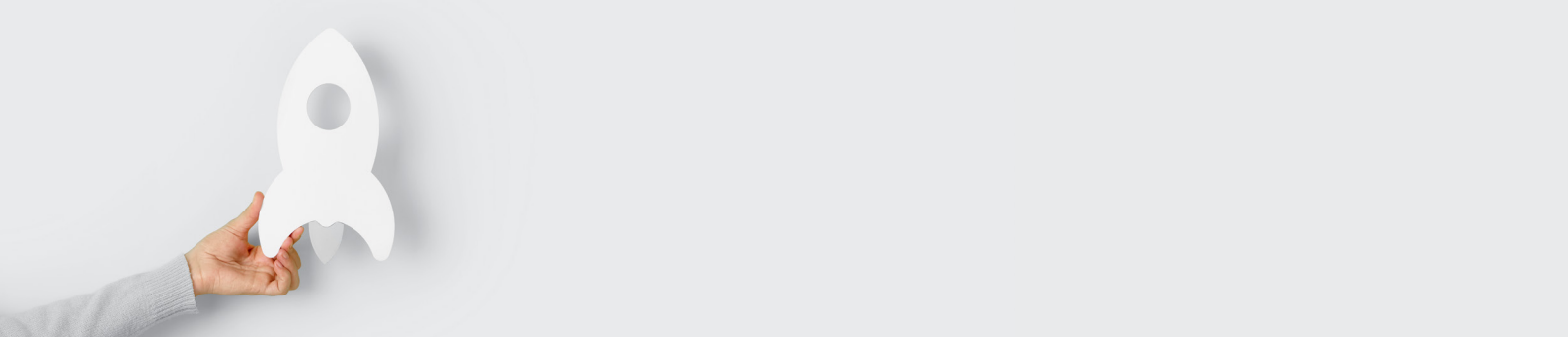


START CPQ & CONFIGURATORS SUCCESSFULLY

# Comprehensive checklist





# Get started with your CPQ project!

This checklist provides you with structured support to gain a comprehensive overview and ensure that all relevant requirements for your Configure Price Quote (CPQ) solution are taken into account. Remember: the more precise your ideas and requirements are, the quicker you will achieve the desired result.

## 1. Define strategy & objectives

### → Clarify company goals

The success of a project stands and falls with a clear definition of objectives. It is decisive for the key function and structure of the CPQ solution. What is the primary objective of your CPQ solution?

Define a main goal:

---

---

---

### → Define KPIs

Clear and measurable key performance indicators (KPIs) help you to measure progress, identify optimization potential and make well-founded decisions.

Define KPIs:

---

---

---

#### Examples:

- Reduce average quotation processing time by 50 %
- Reduce time to generate quotations to less than 10 minutes
- Increase automated quotation generation to 80 %
- Reduce error rate in quotations by 90 %
- Reduce the number of unapproved discounts by 90 %
- Increase the cross- & upselling rate by 30 %
- Reduce invalid or incorrect configurations by 90 %
- Implement price and rule changes in under 24 hours



## → Identify stakeholders

Who are the key players?

- ☐ Management
- ☐ Distribution
- ☐ Product management
- ☐ Marketing
- ☐ Construction & production
- ☐ IT
- ☐ Project management
- ☐ Other: \_\_\_\_\_

✧ Tip: Involve stakeholders at an early stage and collect their requirements to minimize subsequent adjustments.

## → Budget & resource planning

Is external support required (e.g. CPQ implementation partner)?

- ☐ no
- ☐ yes

Is there a fixed budget for your CPQ solution?

- ☐ no
- ☐ yes → \_\_\_\_\_ Euro

An example of a rough budget calculation:

Cost category	Estimated costs
Monthly license fee	<ul style="list-style-type: none"><li><input type="radio"/> 700 - 2.000 €</li><li><input type="radio"/> 2.000 - 4.000€</li><li><input type="radio"/> über 4.000€</li></ul>
Implementation effort	<ul style="list-style-type: none"><li><input type="radio"/> 25.000 - 50.000 €</li><li><input type="radio"/> 50.000 - 100.000 €</li><li><input type="radio"/> over 100.000 €</li></ul>

💡 Cost-benefit analysis: A CPQ system can often result in savings of €100,000+ per year thanks to faster quotation preparation and fewer errors!

## → Define milestones

Milestones	Schedule
1. Kick-off	MM/DD/YYYY
2. _____	MM/DD/YYYY
3. _____	MM/DD/YYYY
4. _____	MM/DD/YYYY
5. _____	MM/DD/YYYY
6. _____	MM/DD/YYYY
7. _____	MM/DD/YYYY
8. Go-Live	MM/DD/YYYY

## 2. Analyze sales process

Let's take a closer look at the sales process to better understand which sales channels you are active in and the challenges involved.

### → How are your products sold?

#### Distribution channel

- ☐ Direct sales
- ☐ Indirect sales
- ☐ Multi-channel sales
- ☐ Omni-channel sales

#### Place of sale

- ☐ Stationary
- ☐ Online
- ☐ Hybrid

### → What are the current challenges in selling your products?

---


---

### → How many quotes do you create each month?

---

### → Important questions for sales process analysis:

- How does the quotation process currently work?
- What is the average bid amount?
- How long does it take on average to prepare a quotation?
- Where do errors or delays occur?
- What approval processes are there - who has to approve offers?
- How often do you need to consult with product management and technology?
- ...

 Tip: Go through all sales channels and processes step by step: Where are there problems? What costs the most time? What challenges occur again and again?

---

---

---



Example of an offer process analysis

Process step	Current duration	Target with CPQ
Request for quotation	1 day	Automated
Product configuration	2 days	20 minutes
Price calculation & discount approval	1-2 days	Automated
Quotation & shipping	1 days	Automated

☆ Tip: Identify bottlenecks where CPQ can bring the most savings.

### 3. Analyze users

Let's take a closer look at the target group. However, the focus should not be on the target group to be purchased, but rather on the users. The people who operate the configurator. In some cases, buyers and users are the same person - but not always. Why is this so important?

→ Who are your users and what is particularly important to them?

Users	What is important to them?
Customers Anonymous users	<hr/> <hr/> e.g. They want a simple, intuitive and visually appealing experience that helps them to configure their desired product quickly and precisely on their own.
Field sales force	<hr/> <hr/> e.g. You need a tool that can be used flexibly and on the move to provide customers with the best possible advice on site and present customized solutions.
Internal sales department	<hr/> <hr/> e.g. The focus is on fast and error-free quotation and order processing. Integration into existing CRM or ERP systems is often crucial here.
Distributors	<hr/> <hr/> e.g. You need a solution that enables you to create customer-specific offers efficiently and present prices and availability transparently without constant queries about feasibility.
Product manager	<hr/> <hr/> e.g. For them, it is important that the configurator correctly displays current product data, variants and technical restrictions and can be easily maintained.
Divers	<hr/> <hr/>

**i** Tip: In this context, we recommend creating personas. In order for the CPQ tool or configurator to become an efficient salesperson, well-informed customer advisor or your personal sales assistant, it is important that we understand which people it will encounter in its work. With jointly created personas, we want to get a good picture of these people.

Companies that are the first to  
respond to an offer receive

**50 %**

more orders.

## 4. Products & dependencies in detail

The heart of every configurator is the product or product range. In this context, we also speak of a technical solution space. It maps the underlying logic of the product ("product intelligence"). All features, characteristics, rules and thus possible combinations of a product that are to be mapped must be taken into account.

The end result is a closed technical solution space that defines the number of possible combinations and thus configuration options. If you want to carry out further calculations in the background (price, weight, maximum output, etc.), this must also be taken into account during the planning stage. It is important to define the logic behind the calculation and to ensure the availability of all initial values.

### → Product features & characteristics

We recommend presenting the product features and their characteristics using a product tree (see next page).

### → Dependencies & rules

Each product feature can contain a list of rules. Which rules and dependencies apply to the individual features (e.g. model XY is only available in the color black, minimum dimensions for type "rectangle": 5000mm ...)?

---

---

---

---

---

---

---

---

---

---

---

---

### → Accessories

Which products/articles can be extended with accessories?

---

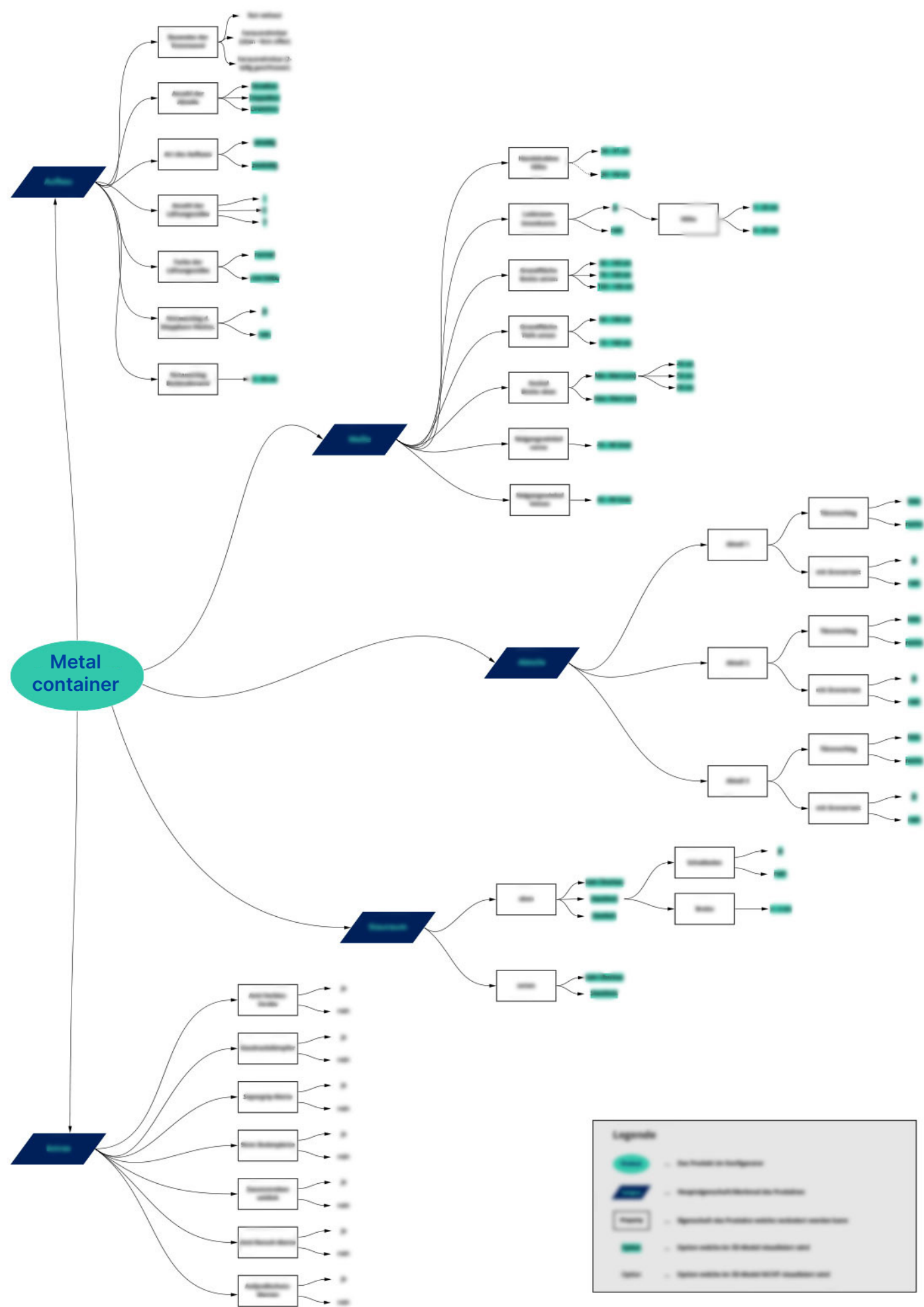
---

---

**i** Tip: Choose a CPQ solution that gives you maximum freedom - no matter how many millions of dependencies or countless rules come into play. None of this should be an obstacle - either today or in the future. Rely on a solution that can be easily expanded and flexibly scaled.



Fictitious example of a product tree





## 5. Price & discount structures in detail

The “Prices & Discounts” area is a central component of a CPQ system, as it forms the basis for precise and competitive quotations. Only with correct prices and clearly defined discount structures can misjudgements be avoided and margins optimized.

→ What does the price calculation in your company look like? How are the prices made up?

---

---

---

---

→ Are there different prices per target group (e.g. for distributors)?

---

---

→ Approval & release processes

- Is there an internal approval process for prices & discounts?
- If so, how is this approval workflow structured?

---

---

---

→ Do you have dynamic (per m<sup>2</sup> or running meter) or static prices?

---

---

→ Internationalization

For which countries should the CPQ system be used?

- Languages: \_\_\_\_\_
- Currencies: \_\_\_\_\_
- Units of measurement: \_\_\_\_\_

Sales employees spend only

**22 %**

of their time on sales. Manual, tedious and monotonous tasks hold sales reps back and waste 66% of their time on unproductive tasks.

## 6. User Interface - Design of the user interface

A well thought-out user interface not only makes CPQ systems easier to use, but also makes a significant contribution to how efficiently and intuitively users can work with the system. As CPQ solutions are often used by non-technical users, clear and intuitive user guidance is crucial to the success of the system.

### → Which design should the configurator be based on?

- ☐ Corporate Design
- ☐ Website

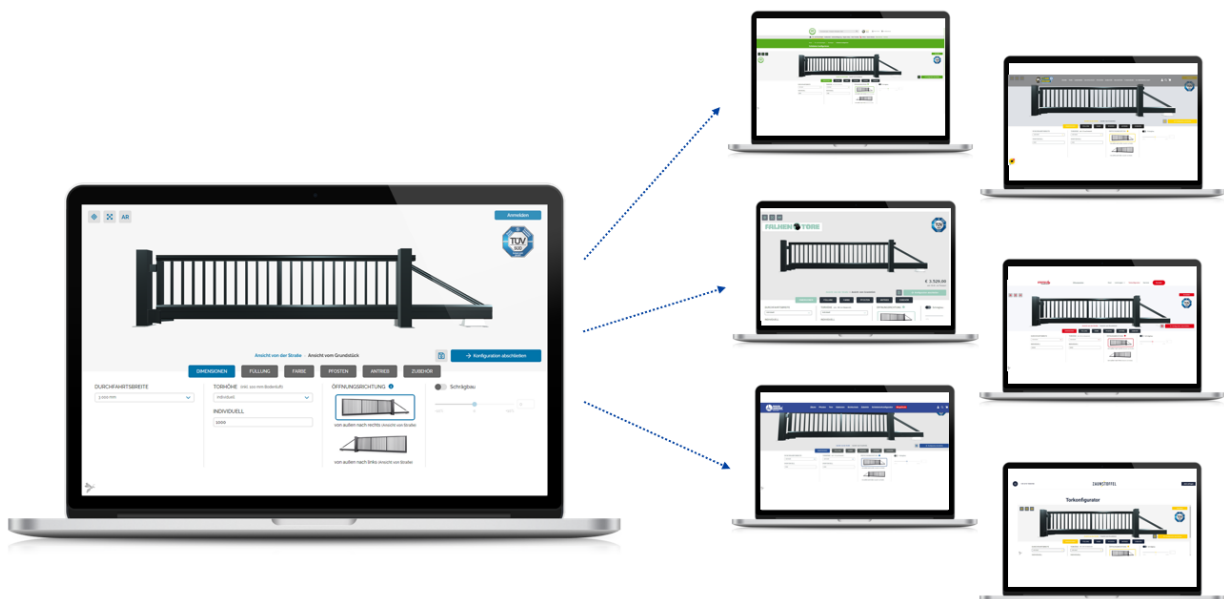
Notes: \_\_\_\_\_

### → White labeling

Should the configurator be prepared for several brands. The same configurator would be available in different designs.

- ☐ Yes
- ☐ No

**i** Tip: You can customize the design - for example, retailer XY gets a completely different color scheme than retailer Z. This way you create a uniform, yet brand-specific experience for your partners and customers.



### → Advisory function

Should information areas, product sheets, videos,... be integrated to explain the product additionally?

- ☐ No
- ☐ Yes, we would like to integrate the following data:

---

---

---

## 7. Visualization of the products

Product visualization is often neglected, especially in CPQ solutions, although it plays a decisive role here. Complex products can be visualized at the touch of a button, which makes it much easier to understand the product.

### → How should the product be visualized?

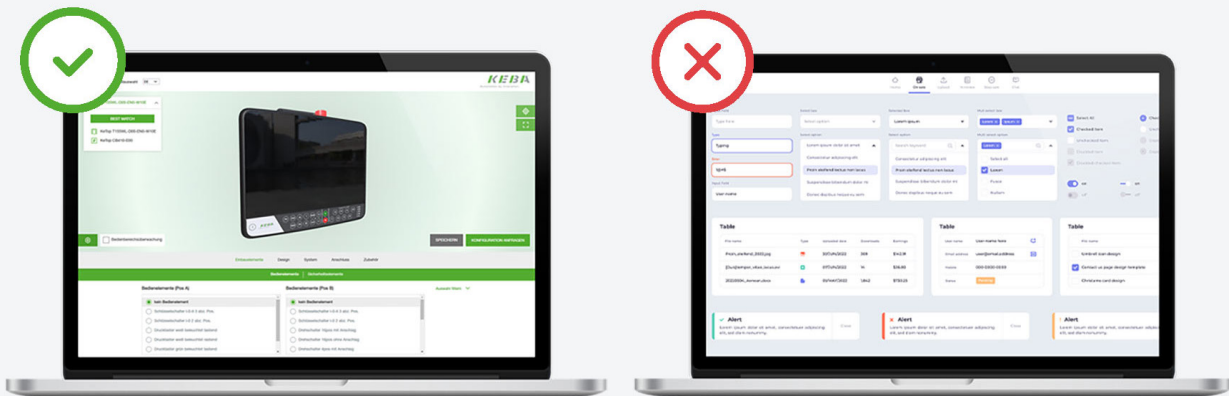
- 2D
- 3D
- 2D & 3D
- incl. augmented reality

### → Initial data

What initial data is available for product presentation?

- Finished 3D models
- No finished 3D models yet, but we have
  - CAD data
  - Drawings in vector or raster format
  - Image material
  - Polygonal data (.fbx, obj,...)
  - Physically provided products
  - Notes: \_\_\_\_\_

**i** Tip: Where would you rather configure a product or create a quote? In a confusing database - or in a tool that clearly displays all configurations in real time?



## 8. System integration - integration into the existing infrastructure

### → Where should the configurator be integrated?

- ☐ On a website
- ☐ In a B2C webshop
- ☐ In a B2B shop/portal
- ☐ For internal use (company portal,...)

### → What does your system landscape look like?

Which systems are you currently using?

#### ERP

- ☐ SAP
- ☐ Oracle
- ☐ Microsoft Dynamics 365
- ☐ Odoo
- ☐ Other: \_\_\_\_\_

#### CRM

- ☐ Salesforce
- ☐ Oracle
- ☐ SAP
- ☐ Microsoft Dynamics 365
- ☐ Hubspot
- ☐ Other: \_\_\_\_\_

#### PIM

- ☐ Pimcore
- ☐ Akeneo
- ☐ InRiver
- ☐ Salsify
- ☐ Other: \_\_\_\_\_

#### E-Commerce

- ☐ Shopware
- ☐ Shopify
- ☐ WooCommerce
- ☐ Magento
- ☐ Prestashop
- ☐ Other: \_\_\_\_\_

#### Miscellaneous data sources

- ☐ Excel
- ☐ SQL databases
- ☐ Other: \_\_\_\_\_



And what configuration-relevant data is managed in these systems?

#### ERP

---

---

---

---

---

#### CRM

---

---

---

---

---

#### PIM

---

---

---

---

---

#### E-Commerce

---

---

---

---

---

#### Miscellaneous data sources

---

---

---

---

---

### → Which data should be imported?

- ☐ Product specifications: Features, options of a product.
- ☐ Price data: Prices of individual components.
- ☐ Image and media files: Graphics, images or multimedia content.
- ☐ Textual descriptions: Product descriptions, instructions,....
- ☐ Inventory data: Availability of components or products.
- ☐ Further data: \_\_\_\_\_

### Which data & documents,... should be exported?

- ☐ Configuration results: The final choices available to users, including specific products, options and individual settings.
- ☐ Offer document (PDF)
- ☐ Bills of material
- ☐ Price calculation: Costs for the configured products, based on the selected options.
- ☐ Technical drawings & 3D models
- ☐ Ordering information: Information that is required for the processing of orders, such as product numbers and quantities.
- ☐ Further data: \_\_\_\_\_

## Notes

There is space for personal comments and notes.

[illegible]



# Combeeneration

Our solutions:

**CPQ**

**Configurators**

**Price management**

**Quotation management**

Combeeneration GmbH  
Österreich

Telefon: +43 7282 202 00  
E-Mail: [info@combeeneration.com](mailto:info@combeeneration.com)  
[www.combeeneration.com](http://www.combeeneration.com)