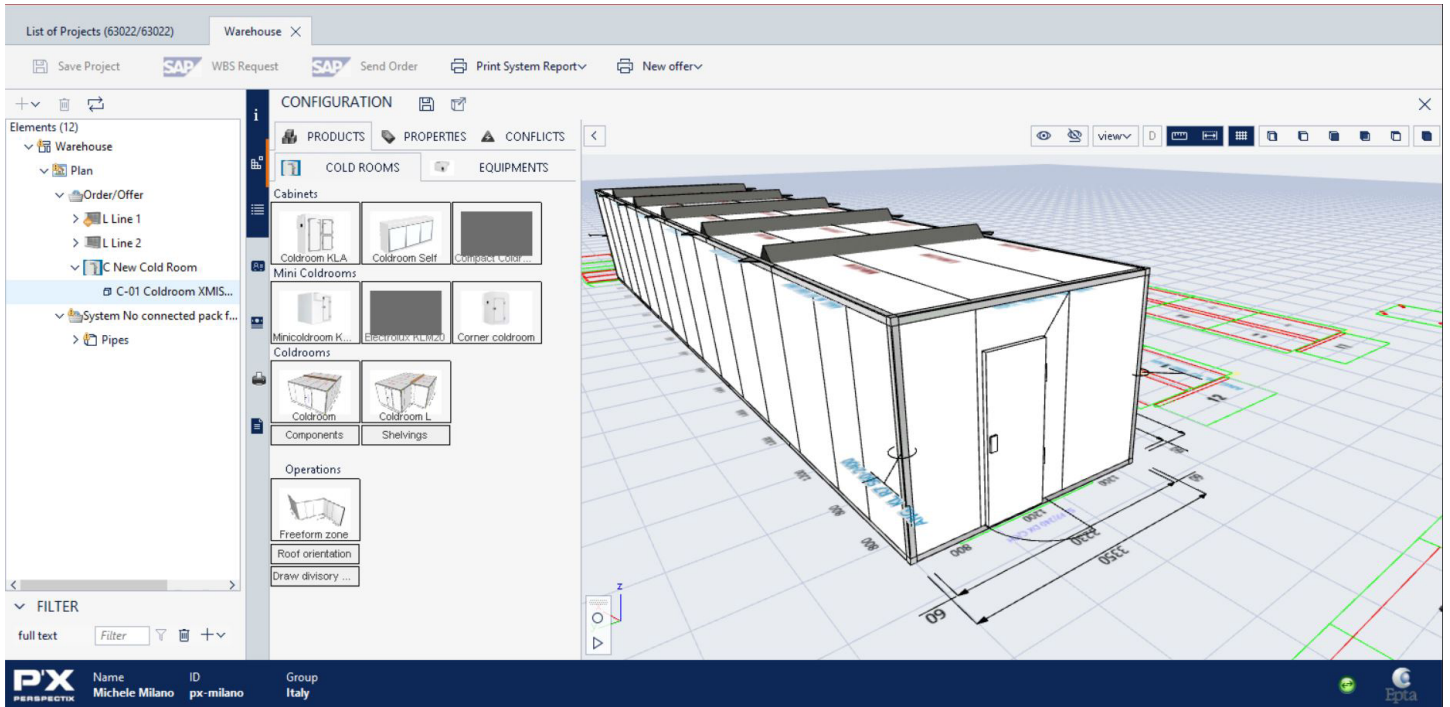


## Five important advantages a CPQ solution should offer every industry

Suppliers of individual but modular product systems are increasingly looking for digital support in sales. The on-board resources of ERP systems are limited and the Configure Price Quote (CPQ) solutions available on the market differ greatly in their scope of services. We describe five important features you should know when making a selection so that the digitization step leads to real improvements.

The offerings of many industrial companies can be located somewhere on a scale between standardized product variants and complete individual products. The greater the degree of individualization, the greater the consulting effort and the more difficult it is to digitize customer interactions. Here, CPQ systems can make a significant contribution to making personal sales more effective and efficient. This applies to the office and field sales teams as well as to the global sales organization.



Digitalization in technical sales succeeds with the P'X Industry Solution

We describe five factors that matter: Seamless interfaces, simple mapping of product logic, perfect presentation and communication options on the Internet. If, in addition, the solution shows a path to the World Wide Web, B2B companies will quickly achieve new business success.

### 1. Integration with CAD, PDM, CRM and ERP systems

Companies that already develop and sell a modular product portfolio usually have all the IT systems in place that are helpful for this purpose. All technical and commercial information is already available - in CAD and PDM systems on the one hand, and in CRM and ERP on the other. To avoid duplicate data storage, redundancies and inconsistencies, the aim should be to integrate as seamlessly as possible.

With an integrated solution approach, the current product knowledge from the design department flows into the customer dialog in a sales-oriented manner. For example, product catalogs can be created from CAD data that is simply reduced to lightweight envelope geometries. Later, these can be used to trigger the creation of corresponding assemblies in the CAD system and, if required, to trigger special designs.

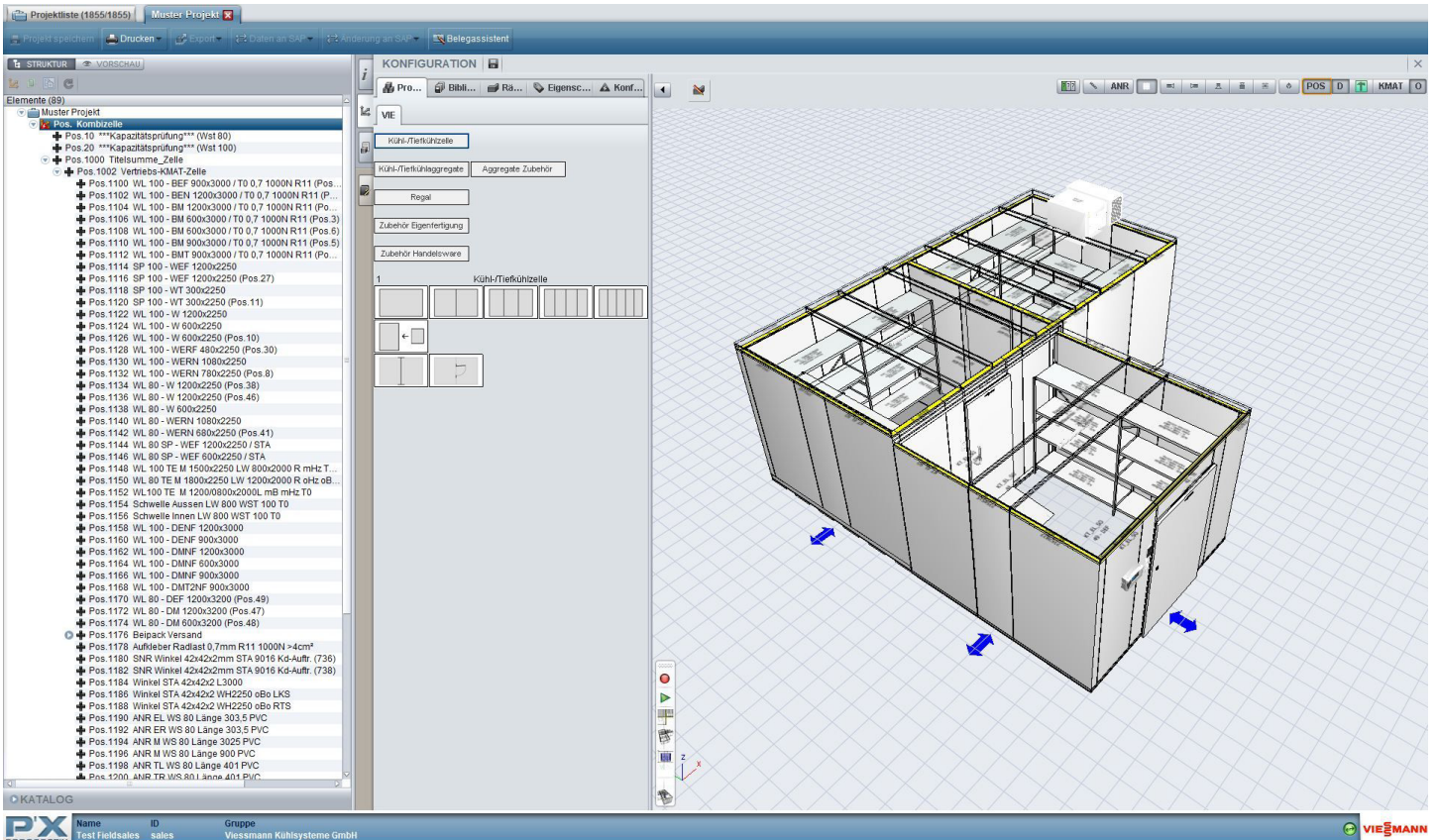
Item information, bills of materials and costing bases must be exchanged with ERP. Ideally, calculations

that are already running during configuration are calculated according to current price information from an ERP system. Various surcharges as well as customer-specific discounts can be considered from CRM data, which also documents the project participants and their interactions.

With an order placed, the external configuration files can be sent to headquarters, where they are processed seamlessly in the ERP system. The existing parts lists, 3D representations and drawings may be used for production and assembly instructions. Later, they accompany the shipping documents to the customer, where they facilitate installation, commissioning and maintenance. End-to-end processes thus ensure on-time and on-budget product deliveries and acceptances around the world.

### 2. Product logic and technical calculations

Every modular product system follows rules that often result in complex product logic. CPQ solutions therefore contain a set of rules that covers all possible combinations of components and allows only the correct ones. This often includes technical calculations: Line cross-sections, flow rates, force developments, accelerations and electrical power values. Only if all these calculations can actually be mapped by the CPQ solution can the sales department obtain the entire product knowledge in a 3D construction kit with which it can independently fulfill customer



The structure of the P'X Industry Solution guarantees seamless integration with CAD, PDM, ERP and CRM

requirements. In addition, product development and technical sales have an efficient bidirectional communication platform with the product configurator.

### 3. Perfect online presentations

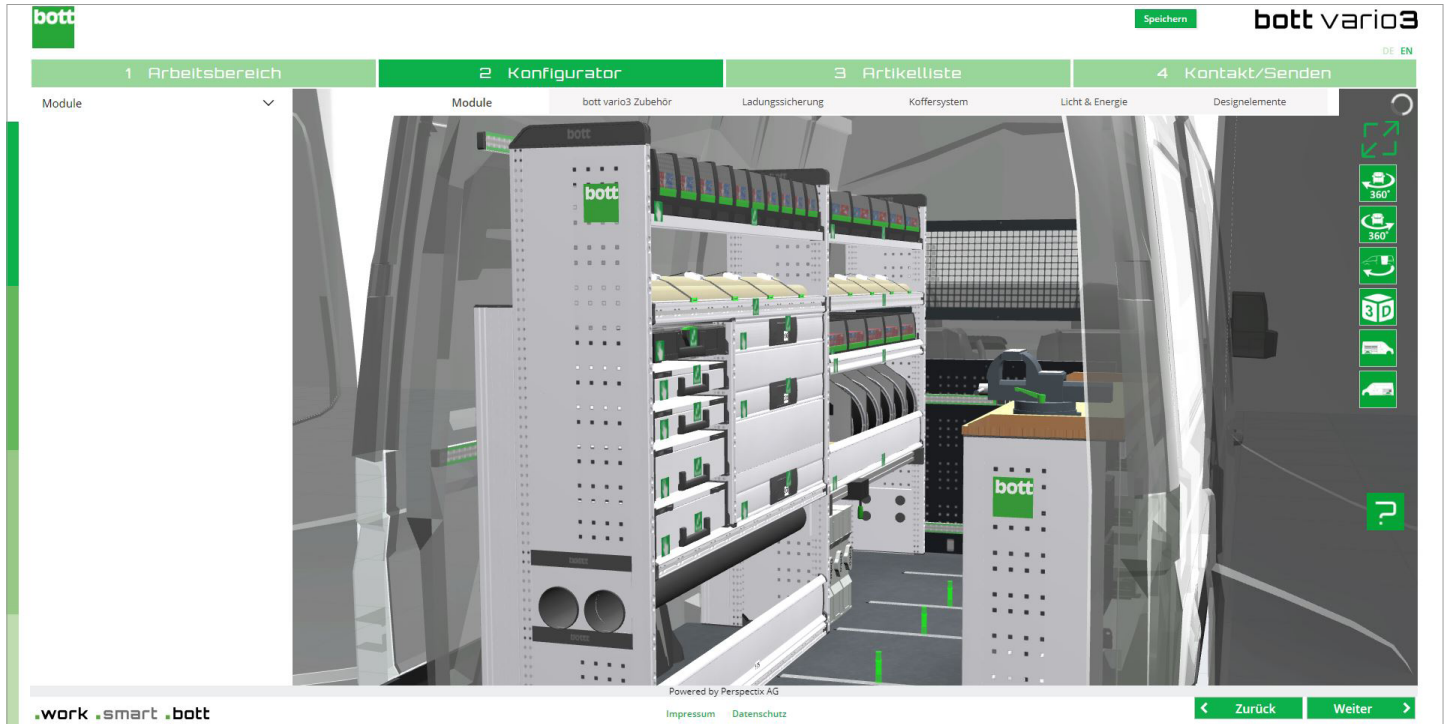
A meaningful 3D visualization of an individual solution proposal from the modular product system is decisive for sales success. That's why the CPQ solution should make all product features visible in a 3D space, as much as possible to be experienced interactively. The simpler, faster and more intuitive a product configurator presents the product features, the easier it is for the employee to be convinced. The combination of 3D models and product logic should eliminate all spatial and formal error possibilities.

Where personal sales are predominant, on-site configuration using the configurator on a laptop should be possible. This ensures, that all customer requirements are fully recorded and offers excellent opportunities for 3D presentation. Higher quotation quality and fewer correction loops reduce process costs. New products can be placed on the market more quickly.

The global sales organization should have the same possibilities to configure and present individual solution proposals as the head office. This includes a sensible method for updating the entire database in updates and upgrades. This allows new products to be brought to market faster and discontinued components to be eliminated.

### 4. Online project platforms

Where face-to-face appointments are not appropriate or possible, a web platform such as Perspectix's Consumer Communicator opens up new possibilities: Configuration and setup proposals are provided with explanatory documents in a project-specific Web front end. Invited customers access it via a secure web link and can immediately view the project in 3D views. The usual functions such as rotating and zooming are available, as are marking and commenting. The viewer chooses between the entire installation environment or a detailed view - quotation or parts list information can be provided in supplementary documents. This makes communication in video conferences or on the phone much easier. The technology used allows access in all common browsers as well as use with mobile devices.



End customers use the Web Configurator to make qualified inquiries that lead to new orders from the Internet

## 5. The way to the World Wide Web

Suppliers of complex, technical product systems have a hard time presenting their products in web stores, because customers usually expect customized solutions that fit exactly to fixed framework conditions and often have to solve very specific challenges.

For a Web offering, manufacturers must therefore specially prepare their product portfolio, i.e. reduce complexity and function selection. Preconfigured modules of this kind can increase user-friendliness and sales success. A web configurator specially designed for high usability guides users quickly and reliably to initial results with appealing 3D visualization. This gives the manufacturer's range of products a presence on the Internet and leads to qualified inquiries. Interested parties request an individual offer with the project file. The second step is now taken by the sales organization, which prepares feasibility checks, consulting services and detailed quotations based on the project file.

Perspectix, for example, offers such a web configurator, which also uses the existing database of the on-premise solution. Together with the existing integration to CAD and ERP, this considerably reduces the initial effort and halves the subsequent maintenance effort.

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## About Perspectix

Perspectix in Zurich implements sophisticated software solutions for technical sales and store planning. Since its foundation in 1996, the company has continuously developed into the leading technological solution provider for sales and project planning of products with many variants. Users of the P'X Industry Solution benefit from experience in complementary user industries: Engineering, plant engineering, electrical engineering, furnishing, store fitting, warehousing and logistics systems. The P'X Retail Solution provides users with a customized solution for store planning, product range design and store evaluation.