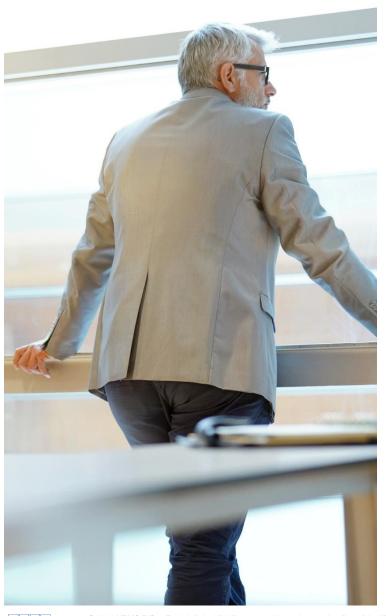# Manage your complete sales cycle with CPQ

A Salesforce feature offered by KPMG

Salesforce CPQ

Configure, Price, Quote

- **Helps sales reps generate accurate quotes**
- **Customise your products to fit any use-case**
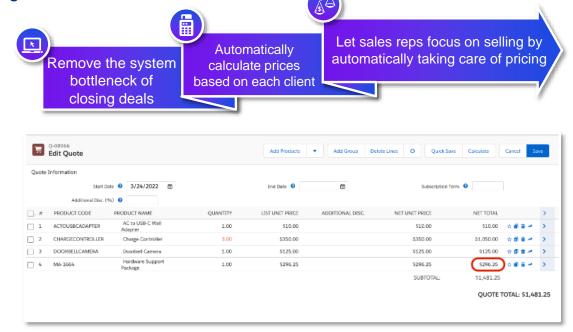- **Generate quote documents ready for signing in an instant**

Advanced pricing logic

Increase your company's bottom line by making sure that your sales team always delivers accurate quotes while keeping track of discounts and margins

Salesforce CPQ allows your sales reps to accurately price your products and services.

Manual or automatic discounts based on e.g. tiers are automatically added and shown in real-time while creating quotes.

Remove the system bottleneck of closing deals

Automatically calculate prices based on each client

Let sales reps focus on selling by automatically taking care of pricing

Salesforce CPQ supports accurate pricing by:
- Utilising your centralised data in your CRM to create special prices depending on e.g. customer type, quantities, previously agreed discounts, etc.
- Creating accurate forecasts based on whether your customer purchase one-time products, subscriptions or usage-based products.
- Creating advanced approvals and order management to ensure all necessary parts of the sales cycle are able to review quotes before sending to clients.

With Salesforce CPQ all the wonderful data in your CRM system can be used as an advantage to create the best quotes based on each client. CPQ enables complete transparency to the costs of selling your products. It also allows you to report on your most valuable products and clients to enable sales reps to focus on high-value deals. It also guarantees that your sales reps never forget previously agreed prices with clients by creating custom workflows that support the sales cycle.
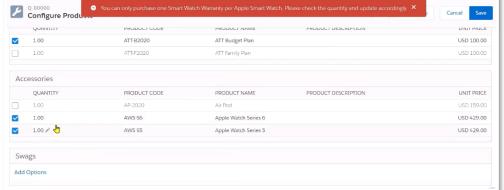
Benefits — High

Data quality & compliance	●●○
Time reduction & efficiency	●●●
Improved customer service	●●●
Scalability	●●●

Estimated effort — Med

Data quality & compliance	●○○
Time reduction & efficiency	●●○
Improved customer service	●●○
Scalability	●●●

Bundles and product dependencies
Ensure that products or services are never sold to customer without them having purchased the pre-requisites

CPQ allows you to configure your products to fit any sales model and supports bundling, add-ons, upgrades, etc.

Create product dependencies or exclusions to assist sales reps in the quoting process.

Bundle products that should be sold together

Prevent clients from purchasing duplicates

Increase trust from clients by selling the right products the first time

Q-00000
Configure Products

⊖ You can only purchase one Smart Watch Warranty per Apple Smart Watch. Please check the quantity and update accordingly. ✕   Cancel   Save

QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
☑ 1.00	ATT-B2020	ATT Budget Plan		USD 100.00
☐ 1.00	ATT-F2020	ATT Family Plan		USD 100.00

Accessories

QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
☐ 1.00	AP-2020	Air Pod		USD 159.00
☑ 1.00	AWS-S6	Apple Watch Series 6		USD 429.00
☑ 1.00	AWS-S5	Apple Watch Series 5		USD 429.00

Swags

Add Options

Salesforce CPQ allows you to configure all your products to support your sales team by:
- Always making sure that quotes contain complete information and all necessary products before continuing the sales cycle.
- Automatically excluding or including certain products based on the selection of other products.
- Combining products or services with different pricing types, such as e.g. one-time payments and subscription payments, to create accurate quotes from the get-go.
- Establishing a clear overview of all your existing clients' purchased products and services to make upselling and cross-selling opportunities clear, while abiding by previously contracted prices.

Product configuration is essential in making sure that sales reps choose the correct products and services based on individual client needs. Based on your organisation's needs, CPQ can be configured with soft or hard mechanics to prevent inaccurate quotes, i.e. simple warnings or actually blocking reps from proceeding with the quote until dependencies are complete.
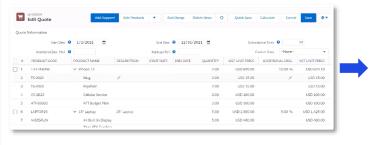
Benefits	**High**
Data quality & compliance	●○○
Time reduction & efficiency	●●●
Improved customer service	●●○
Scalability	●●○

Estimated effort	**Med**
Data quality & compliance	●○○
Time reduction & efficiency	●●○
Improved customer service	●●○
Scalability	●●○

Document generation
CPQ allows you to transform your quotes into professional documents ready for signing in a matter of seconds

Build native document templates in Salesforce to automatically populate documents with data from your CRM.

Allow sales reps to quickly visualise their quotes to the client, in an easily readable, professional document.
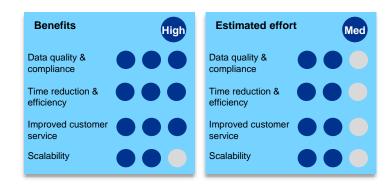
Utilise all your CRM's data in your documents

Allow your sales reps to focus on selling

Build flows to ensure quotes are approved before sending to client

Salesforce CPQ allows you to build quote templates with out-of-the-box features supporting:
- Dynamically displaying columns on the quote documents, e.g. only showing discount column if discounts are actually being offered on the quote.
- Automatically attaching specific quote terms depending on which products are purchased.
- Building different templates depending on your client types to ensure the best fit for every customer.
- Grouping your products on the document by any metric you wish: product type, subscriptions/one-times, etc.
- Generating quote documents in any of your organisation's supported languages.

CPQ replaces the often arduous process of creating documents that contain all the necessary information that has been part of the sale. Sales reps can email their clients directly from Salesforce with a complete quote document containing information such as e.g. products, prices, discounts, contact information, terms & conditions, signature block, cover page, etc. CPQ Document generation integrates seamlessly with the rest of your CRM, supporting approval flows and easy adjustments to quotes.

Benefits	High
Data quality & compliance	●●●
Time reduction & efficiency	●●●
Improved customer service	●●●
Scalability	●●○

Estimated effort	Med
Data quality & compliance	●●○
Time reduction & efficiency	●●○
Improved customer service	●●○
Scalability	●●○

Contracting and upselling

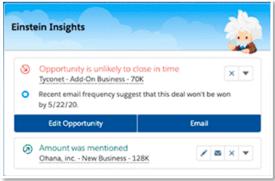## Keep track of your clients' current contracts and assets, while supporting unambiguous upselling and cross-selling opportunities

All purchased subscriptions and assets are clearly displayed on client accounts when they sign contracts with your organisation.

Sales reps receive detailed information regarding contracts during times where renegotiation is needed.

Complete overview of your clients' purchases and prices

Automate uplifts, renewals and amendments

Guarantee that upselling and cross-selling opportunities are never missed

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Salesforce CPQ helps you maintain good relationships with your clients by:
- Quickly giving your sales reps an overview of which products synergise well with ones that they have already purchased.
- Notifying sales reps when contracts are about to conclude, so they can contact the client again directly through Salesforce.
- Supporting pre-determined uplifts on contracts for when it is time to renew.
- Easily replacing existing products on a client's contract if they choose to upgrade to a newer version.
- Creating reports and dashboards for an overview of which clients are most essential to your business to help task prioritisation.

Having your contracts clearly displayed in your CRM allows you to take advantage of the valuable customer data stored in Salesforce to make calculated decisions on how to proceed after a deal has been closed. When a contract is amended in CPQ, all changes will immediately be visible at the account level, so that they are always populated with the latest data.

Benefits			High
Data quality & compliance	●	●	●
Time reduction & efficiency	●	●	●
Improved customer service	●	●	○
Scalability	●	●	○

Estimated effort			Med
Data quality & compliance	●	○	○
Time reduction & efficiency	●	●	○
Improved customer service	●	●	○
Scalability	●	●	○

Want to hear more?

Our experts are ready to help if you are interested in hearing more about how these features could benefit your business.

Contact us

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