

conga



**EBOOK**

# **CPQ implementation guide**

# Executive summary

Configure, price, quote (CPQ) software is essential for organizations looking to scale as they grow. But a CPQ tool is only as effective as the processes it supports—making CPQ a true digital transformation project that takes proper alignment, time, and resources. Bringing a CPQ tool into any business is a huge undertaking. Complex product implementations can quickly spiral out of control if an organization is underprepared.

Knowing where to start in this complex process can be the hardest part. Breaking things down into bite-sized bits of information, as we've provided here, will help you garner support and secure executive buy-in. As you plan for your CPQ implementation, use this guide as a resource for your team to align on and ensure success.

## This guide covers the following topics to help you plan for a CPQ implementation:

- Define your CPQ implementation project
- Prepare for an implementation
- Execute your project
- Rollout and long-term success

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# Define your CPQ implementation project

We recommend having your ideal outcomes in mind before you start investigating the various CPQ solutions and capabilities. It's easy to get distracted with the bells and whistles, which could put you at risk of taking on more than your team or budget can handle.

## Understand team pain points

Before jumping into design, implementation, and deployment, consult with sales reps to understand their most pressing needs and how the tool would best serve them. Start by identifying the existing bottlenecks, inefficiencies, and backlogs sales teams are struggling with.

Common examples we see include:

- Long quoting timelines
- Too many configurations to understand
- Complex, manual pricing calculations
- No clarity on discount rules
- Small deal sizes and low win rate
- Approval bottlenecks







It's important to keep the needs of your sales teams in mind throughout the implementation process since they'll be the primary users of your CPQ solution. However, don't forget to consider the impact of a CPQ tool on each of your departments. Pull in a combination of voices from different departments, including:

- **Operations/sales ops** to help with understanding data integrations, reporting requirements, and aligning cross-functional processes
- **Engineering or product** teams who know the product functionality and viable configurations and want to ensure smooth order management down the road
- **Marketing** who often oversee promotions that impact the tool, as well as any template designs
- **IT** who will be involved in integrating the tool into other existing systems and maintaining the system post-launch
- **Finance** to help understand margins and create guardrails to prevent financially non-viable discounts
- **Leadership** teams to communicate where more efficiency is needed and to help prioritize goals

Remember, **revenue lifecycle management needs the support of everyone in your organization.** Each team will have important insights based on the unique vantage point of their role.

## Define primary CPQ goals

To set the foundation for success, identify the key business objectives and goals driving your CPQ system integration. These objectives will inform your implementation process, keep your teams aligned on the desired outcomes, and establish the steps your teams need to take along the way.

**Goals vary based on the business needs. Teams often set the following goals:**

1. Reduce incorrect order configurations
2. Eliminate time-consuming reviews and corrections to quotes
3. Increase deal sizes
4. Decrease time to production
5. Stop margin erosion
6. Improve quote turnaround time





To help you determine if you're ready for CPQ, define the following before beginning your searching for solutions:

- **CPQ capabilities most important for your business**

What features are essential for your organization to get started with a CPQ tool (product selection, pricing and promotion optimization subscription management, etc.)?

- **Estimated cost and timeline**

What are your critical dates (sales kickoff, impending law changes, divestitures, audits, etc.)? With these dates in mind, how much time can your organization dedicate to getting this tool up and running?

- **Risks and constraints**

What could potentially hold you back from a successful implementation (employee adoption, budget, messy data)? What are you risking by going forward with a new CPQ tool (human error introduced during setup, workflow disruption for employees and deal cycles, a solution that doesn't solve your main issues)?

- **Major dependencies**

What teams will be impacted by the switch, both directly and indirectly? Do you have other software that needs to integrate with your new product, like your enterprise resource management (ERP) tool?



## Prepare for CPQ implementation

When you bring in a CPQ tool, you're often unifying cross-functional processes that may have previously been siloed or aren't fully optimized. To prepare for your CPQ journey, you must review the processes a CPQ tool will support.

Depending on your needs, this can include documenting a product catalog and mapping out all possible product configurations, collecting pricing and discounting rules, and creating review and approval processes through cross-functional teams.

### CPQ implementation checklist

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## Start by answering the detailed questions below

### Product catalog

- What does the product hierarchy look like? (How many product lines, SKUs per line, bundles, etc.)
- Are there any constraint rules, such as inclusion or exclusion rules? (Product A must be quoted with B, product C cannot be quoted with D, etc.)

### Pricing

- What pricing models do you use (e.g., usage, subscription, volume, flat etc.)?
- How many pricing rules exist for discounts, overrides and volume purchases?

### Quotes and agreement templates

- Who can create quotes (internal reps, channel partners, distributors, B2B buyers, B2C customers, etc.)?
- Are there fixed clauses that need to be interested? Terms and conditions?

### Processes

- What approval rules do you follow? Who is the approver(s) and what thresholds need to be met?
- What are your reporting requirements

## Materials to collect for CPQ implementation

- Current agreement templates
- List of sellable SKUs
- Pricing in Microsoft Excel that includes all formulas for a more streamlined process
- List of product rules (minimum quantities X must be sold with Y, etc.)
- List of product attributes that can be used for filtering
- Any product images that should be included in the final quote

**When you partner with Conga, we will guide you through the process to ensure you have everything you need to get started.**



# Execute your implementation plan

Every implementation is unique, but there are overarching guidelines that organizations can use so they don't enter the process blindly. CPQ tools are complex and require deep integration, so a thorough approach is necessary for success.

## Implementation methodology

At Conga we approach implementing CPQ through an agile framework. Agile uses sprints, which are short project cycles, to continually release enhancements to products or services. The flexibility of sprints allows for fluid reprioritization and can result in a higher-quality deliverable. Agile is best suited for project teams that need flexibility and speed.

Each phase of the agile approach can be aligned with what works best for your unique business.

### Stage 1: Customer readiness

Conga will collect data and requirements which will include pre-work templates. (Hint: if you answer the questions to prepare for a CPQ tool mentioned earlier, this stage will be easier).

### Stage 2: Plan and define

Here we outline initial objectives, finalize scope, and create a high-level project plan.



### Stage 3: Design

Now, we'll establish high-level design for the tool. Requirements outlined in stage two will be turned into a system architecture, application process flows, page layouts, and user experience.

### Stage 4: Build

In this stage the solution is configured to meet the design requirements.

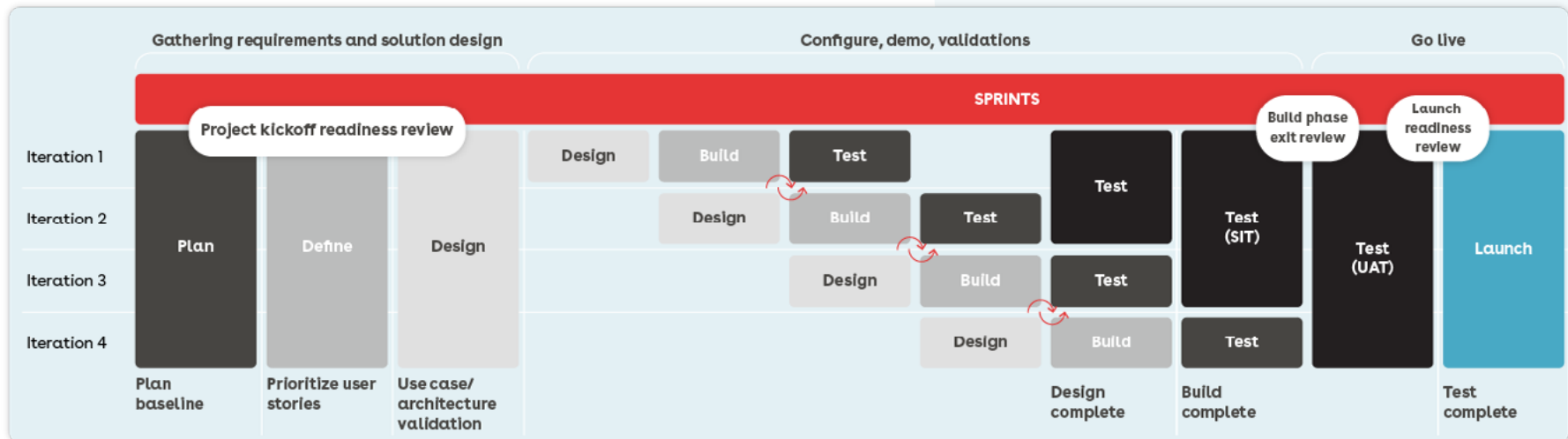
### Stage 5: Test

Here all parties confirm the system is configured to the requirements and design. End-to-end testing and user acceptance testing is completed.

### Stage 6: Launch

Deployment of the solution and the start of the hypercare period.

**Conga also has a network of partners and system integrators that bring unique skills and industry expertise to aid in this process.**





## Project governance

The Conga team is responsible for:

- Post-signature implementation provisions
- Design documentation
- Technical implementation
- Training admins and trainers
- Deployment/go live
- Optional health assessment six months after go-live

Your internal (stakeholder) team is responsible for:

- Identifying stakeholders
- Providing requirements
- Validating technical implementation
- Facilitating user acceptance testing
- Validating solutions in production
- Training your user base



## Understand what can go wrong

Knowing what pitfalls could derail your process is always a good idea, as mistakes can be disastrous.

CPQ implementation goes awry when:

- The quality of the data being fed into the system is poor. The output of the tool is only as good as the input and correcting the data can lengthen the process.
- Stakeholders haven't fully bought into the project. CPQ needs information from many departments to work effectively. Information gaps can create a bumpy process.
- The tool is over-customized to compensate for broken processes. Customizations often hide process problems and there's usually a more efficient way to achieve the same outcome.

When you understand what the common pitfalls are, you can work to avoid them in your planning and execution.



## Rollout and long-term success

With an implementation looming, it can be hard to step back and plan for long-term success from the very beginning. But it's pivotal to the project to have a plan for onboarding, long term support, and optimization.

### Change management and training

Before you start onboarding, communicate the need for a CPQ tool and how it will benefit the end user and the organization. Ensure that everyone understands the rationale behind the change. Get your stakeholders involved in creating buy-in within their teams and resolve any open questions. They can help create a sense of ownership among the broader teams.

Then, create a training plan on the CPQ functionality and any process changes. Training should start with clear objectives and outcomes that get the team excited about how this will improve their day-to-day. In the training content, introduce them to what CPQ is and does, give a demo of its key features, and provide hands-on exercises and opportunities for them to practice using the tool. A great way to understand if your training plan will be effective is by testing it with a small group so they can help you identify areas that need improvement.

## Operationalize teams for long term support

To ensure long term success with a CPQ, it's important to allocate adequate resources to support the new tool to ease the change. Staffing, funding, and technology maintenance are all important considerations. For example, which team will be responsible for tool maintenance post-implementation, such as setting up new templates, SKUs, approval rules, etc.? Planning this beforehand will make the change smoother for everyone involved.

## Measure and optimize

Always encourage and support feedback from employees and stakeholders and be prepared to make changes. Accept that unforeseen challenges can arise in the change process and be adaptable when they come up. Use the goals your organization identified to decide how you will measure success throughout the process. You can start measuring your success by asking yourself the following questions:

- Have incorrect order configurations been reduced?
- Did you shorten the time spent reviewing quotes?
- Are deal sizes larger?
- Did time to production decrease?
- Did a decrease in deals eat too far into your margins?
- Are you getting quotes out the door faster?

Build in steps to optimize performance on both sides of the process: the tool and the user.





## Conclusion

Conga CPQ delivers increased sales and improved margins by simplifying the selling of complex products and services, to enable a more efficient and profitable sales process. With Conga CPQ, organizations can make the most of every revenue opportunity, driving faster and more accurate quotes at the optimal price.

Conga CPQ supports:

- Assisted selling or buying for the correct product configuration
- Optimal pricing for each component, including contracted prices
- Quick completion of required approvals
- Upsell and cross-sell suggestions
- Quotes delivered in hours rather than days, creating a higher probability of winning the deal.

Conga collaborates with many implementation partners to ensure each customer is matched with their perfect partner organization. We also offer implementation fully led by our Conga experts. With a variety of options, we strive to customize the implementation process for each customer and support their unique needs.

[Get a demo](#)

## About Conga

Conga, the Revenue Company, is the pioneer and market leader in Revenue Lifecycle Management. Its platform is chosen by the world's growth champions to accelerate the end-to-end revenue lifecycle and achieve a Revenue Advantage. Conga brings Configure, Price, Quote, Contract Lifecycle Management, and Document Automation capabilities together on a single open platform that works with any ERP, any CRM, and any Cloud. Conga is born for the top line—powered by a unified revenue data model, complete revenue intelligence, and purpose-built AI—to help companies grow, protect, and expand their revenue.

Conga delivers a Revenue Advantage to over 10,000 customers and 6.4 million users around the world. More than 7 million contracts and 46 million quotes are generated annually with Conga. Founded in 2006, the company is headquartered in Broomfield, CO and has offices across the United States, India, and Ireland. Visit [conga.com](https://conga.com) for more information.



### For more information

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