

# Build Your Business with The Power of CPQ

5 REASONS TO UPGRADE YOUR CONFIGURE,  
PRICE, QUOTE SOLUTION



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Astro and friends will guide you through everything you need to know about Salesforce. With fun, easy-to-follow trails, you'll be up and running in no time.

Find your path forward at [salesforce.com/trailhead](https://salesforce.com/trailhead).

## Is your quoting process becoming a burden?

For some companies, creating sales quotes is handled easily within Salesforce Sales Cloud. But for companies whose quoting processes tend to be a bit more advanced, or those whose growth is causing a quoting bottleneck, you may need additional horsepower. With growth comes a need to manage scale. More deals mean more quotes. More products mean more SKUs. More customers mean more regional concerns, more negotiations, more terms and conditions. More everything.

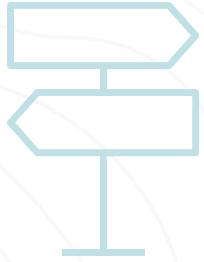
Get more power with Salesforce CPQ. Let's look at five ways that the advanced quoting power of our platform can power your growth.



### SALESFORCE CPQ DRIVES PROFITABILITY

Consider the total hours you put into each quote, from pulling together pricing and products, to formatting and delivering to a prospect. Then multiply those hours by the average salary of the involved personnel. You'll probably be shocked at how much each quote costs.

Salesforce CPQ can automate much of that process – pricing, configurations, formatting, approvals – saving you days or weeks of combined resources, all of which turns into increased profits and frees up time to focus on more opportunities.



# #1 Supporting subscriptions and recurring billing

When you have a few products with straightforward prices, quoting is also straightforward.

To handle subscriptions, you need Salesforce CPQ.

Your offerings might also include recurring billings, such as monthly service or maintenance fees, rental or leasing fees, or other offers that generate invoices and fulfillments.

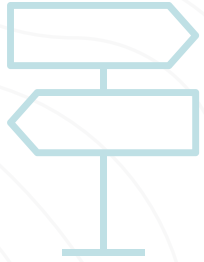
**Salesforce CPQ was designed with subscription selling in mind, allowing you to easily configure and price varying subscription terms, co-term add-on orders, and automatically generate renewal opportunities.**



## QUESTIONS TO ASK

- Will you offer subscriptions of various lengths or open-ended terms?
- Will customers pay full price on a three-month subscription but get a discount on longer-term deals?
- What if customers want to prepay their subscription up front versus being billed each month? Does that change the discount or hamper your invoicing process?
- What happens at the end of the subscription? Are customers automatically renewed, are they tagged for an upsell, or is their subscription simply ended?





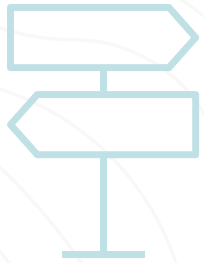
## #2 Considering every option with an advanced configuration engine



Customers today demand flexibility. But while product sizes and colors are obvious options, so are delivery modes and locations, packaging materials and volumes, and more.

If you're offering customers this kind of flexibility, your quotes have to reflect those options and take into account all of the downstream dependencies, exclusions, and other impacts.

**Salesforce CPQ supports even the most advanced product configuration rules (even nested) and enforces them automatically, ensuring that every quote presents a valid configuration or bundle. As you add required services or training, or products with required components or add-ons, we ensure the first quote a customer sees is correct, complete, and comprehensive.**



## #3 Building accurate quotes with dynamic pricing

Dynamic pricing is standard in many B2B industries.

If you employ dynamic pricing, a quoting solution is surely a requirement for locking down rules and leaving no revenue on the table. Even the slightest change in deal parameters can impact dynamic pricing.

**To create quotes from dynamic pricing schemes, you need Salesforce CPQ.**

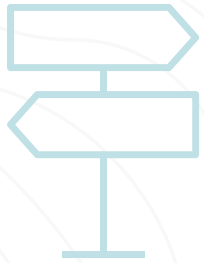
Discount ramps based on volumes are commonplace, but ensuring proper calculations using your current volume thresholds can be a struggle.

Preferred pricing is also a common way to endear your products to partners and strategic customers.

You may also offer time-based pricing, to reward loyal customers with increasing discounts or to mitigate rising resource costs by automatically raising prices over time. Either way, relying on spreadsheets or sales rep memory is a disaster in waiting.

**Salesforce CPQ supports multiple price books based on agreements with different partners and customers, so they automatically get the pricing they expect. Salesforce CPQ also automates variable pricing based on volumes, locations, shipping modes, and more, making it easy to customize pricing for any order and eliminating embarrassing (and profit-draining) errors.**





## #4 Increasing productivity while cutting errors

No matter how simple or complex your pricing may be, quoting manually can undermine even the best teams.

As your business grows, every potential problem is magnified. Real risk lies is well before you send a quote to your customer, which is in your process controls, approvals, and enforcement of other discounting, routing, and quoting rules.

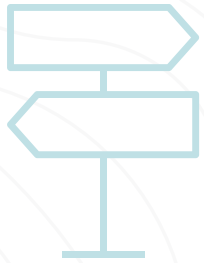
**To handle more quotes with more accuracy, you need Salesforce CPQ.**

When pricing and configuration rules are enforced, less approvals are necessary. When only non-conforming quotes are flagged for additional approvals, managers are free to focus on more strategic issues. When reps aren't forced to dig for current pricing and manually calculate bundle and quote totals, they can spend more time building relationships and closing deals.

Best of all, automation leads to faster deal cycles that require fewer resources to close. Barriers are broken down, roadblocks caused by absent reviewers are bypassed, and rework forced by annoyed customers is avoided.

**Salesforce CPQ helps sales teams quickly create and deliver accurate quotes. Accurate pricing and discounting is ensured, and approvals are automatically routed – but only when necessary. Salesforce CPQ then generates a professional quote document, automatically includes the right collateral, and integrates with eSignature partners for a frictionless buying experience.**





## #5 Better order management

After a quote is accepted, the real work begins. An order has to be generated, an invoice has to be sent, cash has to be received, revenue has to be recognized, audit trails have to be analyzed, and orders have to be fulfilled. The deal is far from done once it's "won," and every detail required by downstream teams resides within the quote.

Delivering on the customer's expectations means giving them what they expect from the quote, which can range from splitting orders to ship different quantities over time to shipping from or delivering to different facilities.

**Salesforce CPQ maintains a downstream connection to the original quote, ensuring alignment along the order management process. Contracted quantities are tracked to prevent over- or under-delivering. Quote specifics are carried through billing and revenue recognition. And every detail is easily reportable, from quotes and orders to invoices and payments.**





# Salesforce CPQ: It's time to upgrade

Salesforce CPQ lets you configure products, price orders, and generate quotes, all with the click of a button, and it's easy to use, on any device, anywhere, anytime.

**Build easy and accurate quotes.** Let sales reps select the right items for each customer, every time. Get consistent pricing and discounting – and approvals when you need them – all while equipping reps to send out more quotes in less time.

**Create faster and cleaner proposals and contracts.** Submit professional proposals formatted and branded to your specifications, and do it faster and with less effort. Always include the right collateral, spec sheets, and terms, and even integrate with eSignatures for an easier and faster buying experience for your customers.

**Easily manage subscription billing and invoicing.** Configure quotes for varying subscription terms and co-term add-on orders. Send recurring invoices and collect cash without complications. Automatically generate renewal opportunities to give sales the chance to upsell.

**Build your business with the power of a faster, easier, more efficient configure, price, quote process. All it takes is Salesforce CPQ!**

## Learn More

Take a Salesforce CPQ Guided Tour.

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CONNECT TO YOUR CUSTOMERS  
IN A WHOLE NEW WAY



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