# Project plan - Visual Configuration and CPQ

This is a template provided by the Swedish company SkyMaker AB to help you get started on your CPQ implementation journey. Fill out your own product specific deliverables and delimitations and make time estimates based on product configuration complexity.

## Step 1 - Pilot

**Goal:** Investigate how CPQ will benefit sales and the company, evaluate technology, build prototypes and set both short term (find quickest way to value) and long term scope (ensure solution will scale).

**Time estimate:** \_\_\_\_\_\_

**Deliverables:**

1. Interviews and workshops with product owners and sales
2. Map of how sales process will look after CPQ implementation
3. Plan of what product to start with - normally a best selling product with well known rules and medium to low configuration complexity to ensure quick way to first launch and usage of the CPQ
4. Map of product configuration rules, options and accessories
5. First version of a intuitive configuration workflow
6. Prototype solution of product configurator to validate choices of CPQ solution
7. Prototype solution of product visualization to validate choices of Visualizer
8. Workshop with presentation of results and discussions of alternatives

**Delimitation for time estimate:**

1. Prototype solution is limited and only for evaluation
2. Limited set of product candidates to evaluate

## Step 2 - Internal product configurator

**Goal**: First configurator up and running internally for junior sales to start configuring a best selling product

**Time estimate:** \_\_\_\_\_\_\_\_\_\_

**Deliverables:**

1. First configuration workflow available for internal sales
2. Most important rules implemented for best selling product - only aim for 80% of most common requests for a quick way to first launch

**Delimitation for time estimate:**

1. No pricing or discounts included (implement later, see step 6)
2. Not a new product - rules are often unknown and few will use it
3. Only one product to configure
4. Limited configuration rules to 80% of most common requests - will actually save time for sales

## Step 3 - Product visualization with configurator

**Goal**: Visualize how different configuration choices impact the product so that anyone understands what's being configured

**Time estimate:** \_\_\_\_\_\_\_\_\_\_

**Deliverables:**

1. Instant visualization of choices in product configuration
2. Simplified visualization of product exterior
3. Integration with product configurator - update on every change

**Delimitations for time estimate:**

1. Not all details included - small parts and non critical accessories added later (see step 8)
2. No photo realism - takes a long time to implement and adds very little value compared to just adding real pictures alongside the configuration.

## Step 4 - Automatic generation of technical documents

**Goal**: Save time for sales by auto generating quotation drawings and lightweight CAD / BIM files from the visualization

**Time estimate**: \_\_\_\_\_\_\_\_\_

**Deliverables**:

1. Auto generate pdf drawing with key views and key dimensions
2. Drawing header containing company logo and configuration information
3. Simplified BOM table visible in corner
4. Automatic export of BIM and / or STEP files

**Delimitations for time estimate:**

1. Single page drawing
2. Attachment to quote done manually by sales

## Step 5 - Public version for homepage

**Goal**: Enable customer / distributors to configure and request quotes

Intuitive error messages

**Time estimate**:\_\_\_\_\_\_\_\_\_\_

**Deliverables:**

1. Integration with homepage
2. Form to fill in contact details (or require login)
3. Automated notification to sales with configuration details

**Delimitations for time estimate:**

1. No instant quote - Final quotation still created by sales (see step 6)

## Step 6 - Auto generation of Quote document

**Goal:** Quote requests from internal / external configuration will automatically generate a quote document with correct price information

**Time estimate**: \_\_\_\_\_\_\_\_\_\_\_

**Deliverables:**

1. Basic layout for quotation document
2. Customer information presented on document
3. Configured products added as rows
4. Pricing rules implemented as formulas
5. Discount rules for volume and distributors implemented as formulas
6. Customer database and price / discount lists integrated
7. Technical documents added as attachments
8. Approval process for quote to new / existing customers (Optional)

**Delimitation for time estimate:**

1. Only one configured product per quotation (simplest to start with)
2. Consistent pricing and discount strategy needed for automation to work
3. No payment handling other than information for traditional wire transfer
4. No international tax rules handled

## Step 7 - Enable external administration of quotations

**Goal**: Enable customer / distributor to access quotes and orders themselves to better compare configuration alternatives and make repeat orders

**Time estimate**: \_\_\_\_\_\_\_\_\_\_\_

**Deliverables:**

1. List of requested quotations with their status and expiration dates
2. Locking of quotations after being requested
3. Function to copy a quotation to modify the configuration
4. Function to make a repeat order of an old quotation
5. Download of attachments and product information

**Delimitations of time estimate:**

1. No organization access to shared quotations.
2. Administration only of individuals quotations

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## Additional steps - Add next product configurator (repeat step 2 - 4)

**Goal:** Add another product configurator to enable more sales

**Deliverables**: TBD

## Additional steps - Add more details to existing product configurator (repeat step 2 - 3)

**Goal**: Make existing product configurators cover more cases in sales

**Deliverables:** TBD