

Project Title: Configure-Price-Quote (CPQ) & Order Visibility Hub for Industrial Manufacturing

Industry: Manufacturing / Wholesale Distribution

Project Type: B2B Salesforce CPQ & Service Cloud Implementation

Target Users: Sales Representatives, Customer Service Agents, Sales Managers, Production Planners



Problem Statement:

An industrial equipment manufacturer sells complex, customizable products. Their sales process is plagued by inaccuracies and delays. Sales reps lack real-time access to inventory and pricing, leading to quotes that promise unavailable components or unrealistic delivery dates. Once an order is placed, it becomes a "black box," with customer service unable to provide customers with accurate shipping updates. This results in delayed revenue, costly expedited shipping, and eroding customer trust.



Solution Goals:

Implement a Salesforce CPQ solution integrated with a custom order management system. The solution will guide sales through product configuration, validate against real-time inventory, automate approval workflows, and provide proactive shipping updates to both internal teams and customers.

- Automate and accurate the Configure-Price-Quote (CPQ) process.
- Provide real-time visibility into inventory levels and production capacity.
- Offer end-to-end order tracking from "Quote to Cash."
- Improve on-time delivery rates and customer satisfaction.

Phase 1: Problem Understanding & Industry Analysis



Requirement Gathering

- Guided selling for complex, configurable products.
- Real-time validation against inventory (inventory_c).
- Automate approval workflows for discounts and long lead-time items.
- Enable end-to-end order tracking (Quote → Order → Production → Shipment).
- Provide dashboards for quote accuracy, on-time delivery, and order backlog.
- Ensure scalability for large product catalogues and multiple regions.



Stakeholder Analysis

Primary Stakeholders (Direct Users):

- Sales Representatives → Create quotes, guided product selection.
- Customer Service Agents → Provide shipment and delivery updates.
- Sales Managers → Approve exceptions, monitor sales performance.
- Production Planners → Plan and update production capacity and orders.

Secondary Stakeholders (Support/Management):

- IT/Integration Teams → Manage ERP and carrier API integrations.
- Executives / Operations Managers → Track KPIs (quote accuracy, delivery performance)



Business Process Mapping

- Sales rep configures product via CPQ guided selling.
- System validates product compatibility and checks Inventory__c for stock.
- If insufficient inventory or long lead time → auto-trigger approval.
- Approved quote converts to Order and generates Production_Order__c.
- Production Planner updates Production Order status (Planned → In Progress → Completed).
- Shipment__c record created → carrier API updates tracking.
- Customer Service Agent shares real-time status with customer.
- Dashboards update managers on sales pipeline, order backlog, and delivery KPIs.



Industry-Specific Use Case Analysis

- Industrial Manufacturing: High customization of equipment with multiple parts.
- Pain Points Today: Manual quoting errors, lack of inventory visibility, no shipment tracking.
- Proposed Benefits:
 - Reduce quote errors by ~90%.
 - Improve on-time delivery by 20–25%.
 - Increase customer trust with transparent order status.



AppExchange Exploration

- Salesforce CPQ (Steelbrick/Revenue Cloud) → Official CPQ package for guided selling & pricing.
- ERP Integration Apps (e.g., MuleSoft connectors) → Fetch stock levels, push orders.
- Carrier APIs (FedEx/UPS) → Track shipments directly in Salesforce.
- Free Salesforce Labs Apps → Useful accelerators for dashboards, notifications, or lightweight prototypes.