

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.
- Validate quotes against real-time inventory and production capacity.
- 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 to merchant trust with transparent ordering 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.