AgileQuote

The CPQ Solution That Helps You Create Not Just Quotes,

But Winning Quotes.

CPQ solution that unravels intricate Sales Opportunities

By increasing throughput of quotations, conventional CPQ solutions are solving a problem that is increasingly becoming irrelevant. With subdued growth in today's economy, sellers are trying to figure out how to make each quote count and increase the win rate of their proposals.

AgileQuote is a state-of-the-art cloud-based solution that automates the end-to-end Configure-Quote process for products that involve complex variations and assemblies like those found in many industries like Automotive, Engineering, Construction & Operations, High Tech and Industrial Machinery & Components.

By leveraging cutting edge technologies and next-generation best practices, AgileQuote helps you to generate winning quotes, not just quotes.

Like any CPQ solution, AgileQuote supports creation of item bundles; costing and pricing; preparation of quotes; quotation approval; development of a complete proposal by attaching a covering letter, terms and conditions, marketing collateral and other types of content to an approved quote.

AgileQuote goes beyond other CPQ solutions and leverages social selling and other next generation best practices to support an array of powerful features that drive greater conversion of quotes to deals. These include:

- Influence Sphere
- Catch 'Em Early
- Competitor Price Benchmark

The building blocks of AgileQuote are shown below:

Benefits

- Improve security of the crucial bidding process. Unlike Excel worksheets containing sensitive costing and pricing information that can be emailed out, quotes in AgileQuote can be accessed only by authorized users.
- Optimize bid cost. By providing a single, integrated platform for bid preparation, AgileQuote saves time of product specialists, C-level executives and other key stakeholders involved in the bid preparation process, thereby optimizing bid development cost.
- Increase accuracy of quotes. Unlike Excel worksheets that are prone to costly errors, AgileQuote ensures that all quotes are technically and commercially accurate, thereby obviating potential losses.
- Make rookie salespersons expert. By storing tacit knowledge from sales veterans and spreading their access to all salespersons, even novice salespersons can come up the curve rapidly.
- Avoid lost sales due to scarcity of product experts. Worksheets for many non-standard configurations are stored and made available in AgileQuote, hence obviating the need for the involvement of product experts who are always in short supply.

Select Items

Quote will be triggered by a specific inquiry from a prospect. AgileQuote will permit the salesperson to progressively put together a "bundle" of "items" to be quoted. AgileQuote fetches the costs / prices of each line item from the company's ERP / equivalent system. Both "outright sale" and "rental" are supported.

Configure Products

A sophisticated configurator permits finished goods and stock keeping units to be assembled together into a saleable bundle. Where applicable, AgileQuote will use constraints and other business rules to ensure that bundles are both technically feasible and make business sense.

Approve Quote

AgileQuote lets the quote maker to enter qualitative information in support of his or her quote and submit the quote for approval by others in the company. By using workflow, AgileQuote ferries the quote around for approval by executives (e.g. VP Sales, VP Finance) whose names can be configured via business rules. Quotes at list price require no approval.

Create Proposal

Enables the user to include Covering Letter and attach marketing collateral viz. Brochure, Datasheet, Case Study, etc., along with the quote to create the proposal.

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Influence Sphere

Build the "Influence Sphere" comprising of one or more contacts in the prospect organization who influence the purchase decision and should therefore be covered by the salesperson apart from the primary contact to whom to proposal is addressed. Connect with such influencers via LinkedIn Invite To Connect, Introduction and InMail. Premium LinkedIn account is required.

Competitor Price Benchmark

Find out past history of competitor quotes before deciding the price. Requires access to one or more of the following sources of data: internal Win/Loss database, order loss reports in CRM, tender results, competitor order-win press releases, and so on. Every time an AgileQuote user prepares a quote, AgileQuote will automatically display the competitor price benchmark. The user is empowered to accept or ignore the system-displayed competitor price benchmark while deciding their quoted price.

Catch 'Em Early

On the basis of their social media behaviour, identify people who are most likely to purchase your product or service. Such people could, for example, be your brand advocates or disgruntled customers of your competitors. Engage with such people early in their purchase cycle - i.e. prior to preparing the proposal - via customized responses to their questions, promotional offers, and so on. Premium access to third-party social intelligence platforms is required.

Dashboards

As soon as a salesperson or sales leader logs on to AgileQuote, they will be shown the following dashboards with the facility to drill down to individual items:

- Quotes to Close: List of all quotes already submitted.
- Pending Quotes: List of all quotes initiated but not submitted.
- Orphaned Quotes: List of all quotes where the customer contact person (to whom the quote was submitted) is no longer employed with that company.

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AgileQuote will integrate with the existing SAP solution. Depending upon the specific situation, this integration will happen via SAP BAPIs, database replication and file transfers at a pre-determined frequency.

The functional scope of the integration will encompass:

- AgileQuote will download item details (item code, item description, bill of material, etc.) from the backend SAP system.

- While AgileQuote will maintain the product catalog locally, it could be sourced from the backend SAP system via live connection, batch upload from SAP or other existing systems via CSV / ASCII files, apart from being entered by AgileQuote Admin user via keyboard within AgileQuote.

- Given a prospect requirement, a salesperson will assemble a Bill of Material of required products, services and bought-out items within AgileQuote.

- Costs of individual line items can be inherited from SAP or entered within AgileQuote.

- Prices, if available in SAP, will be inherited from SAP, else AgileQuote Administrator will be permitted to specify margins, based on which AgileQuote will work out the selling prices and make them available to the quote creator within AgileQuote.

- AgileQuote user can either separately specify an availability date for the quoted items or pick up Available To Promise dates from SAP, should they be available in SAP.

- Once a quote materializes into an order, AgileQuote user will mark the status of the quote accordingly. This will automatically generate a Sales Order in SAP.

Quote Details

Quote Name	:	7th Quote	Sales Organization Name	:	France
Customer Code	:	50000002	Customer Name	:	CustomerI
Requested Date	:	26-Nov-2013	Currency Name	:	EUR
Budget Value	:	25	Prepared By	:	Antonysamy Joseph

Billing Address

Shipping Address

Billing Address			Shipping Address		
Address Line One	:	hj	Address Line One	:	hj
Address Line Two	:	h	Address Line Two	:	h
City	:	ujh	City	:	ujh
State	:	Ain Defla	State	:	Ain Defla
Country	:	Algeria	Country	:	Algeria
Zip Code	:	yyyyy	Zip Code	:	yyyyy
Phone Number	:	ju	Phone Number	:	ju

Bundle Material

Code	Name	Description	Unit Price	Quantity	Total Gross Price	Discount	Total Net Price
2004	Testing Purpose	GetQuoteBased Material	€9,876	1	€9,876	5	€9,382

| 2007 | P046 kit | GetQuoteBased Material | €23,000 | 1 | €23,000 | 10 | €20,700 |
| 2009 | pHMB3000 | GetQuoteBased Bundle | €11,000 | 1 | €11,000 | 15 | €9,350 |

| Grand Total Gross Price | : | €43,876 | Overall Discount | : | 11% | Grand Total Net Price | : | €39,432 |

Bought Out Item

Code	Name	Unit Cost	Quantity	Total Cost	Unit Price	Total Price
3046	Sample One	€1,350	40	€54,000	€1,485	€59,400

| Grand Total Cost | : | €54,000 | Grand Total Price | : | €59,400 |

Material Bundle Warrenty

Code	Name	Description	Warrenty	Override Warrenty
2004	Testing Purpose	GetQuoteBased Material	54	54
2007	P046 kit	GetQuoteBased Material	54	54
2009	pHMB3000	GetQuoteBased Bundle	66	66

Material Bundle Installation

No of FTE's required	Per Day Cost	No of Days Required	Total No of FTE's Costs

5	€500	2	€5,000

Shipping

Code	Truck Cost	Diesel Cost
1019	€45	€45

Quote Qualitative Information

Quote Value	:	€39,432
Gross Margin Amount / Percentage	:	€43,876 / 11%
Leadtime	:	
Win Probability %	:	
Scop Of Work	:	
Executive Summary	:	Test summary
Primary Competitor	:	Primary Cometitor
How was Selling Price Set?	:	What ever you want type here
Payment Terms	:	
Risk & Mitigation	:	
New / Repeat Business	:	RepeatBusiness
Any Other Comments	:	