

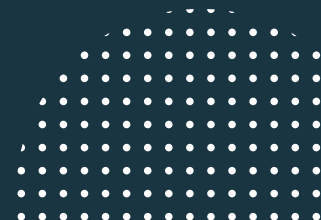


This template is provided by [Dealhub.io](https://dealhub.io) to help you communicate the facts about your need for a CPQ (Configure Price Quote) sales quoting solution and how it could be implemented in your organization.

The template is not a comprehensive project plan but rather a concise briefing with the essential points you'll need to present.

We wish you a successful implementation!

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Get a **FREE** Proof of Concept

Do you have plans for a sales quoting solution in the near future?

You're invited to preview how the DealHub.io sales quoting solution could operate with your products and pricing.

See This Slide for Details.



CPQ Sales Quoting Solution Implementation at [YourCompany]

—
Project Brief

[YOUR NAME]

[Your Title]

youremail@yourcompany.com



Agenda

1. Goals
2. Scope
3. Project Team
4. Stakeholders
5. Timeline
6. Cost Estimates
7. Assumptions
8. Next Steps
9. About DealHub CPQ
10. Next-day PoC





1. Goals

Implement a sales quoting solution into the sales process.

- Benefits it will provide:
 - Key benefit 1
 - Key benefit 2
 - Key benefit 3
- New functionality it will enable:
 - New functionality 1
 - New functionality 2
 - New functionality 3

(see next slide for benefits that can be included here)





(sample benefits and functionality that can be included on previous slide)

- Provide management with governance and enhanced sales insights
- Provide discount oversight with automated workflows
- Integrate sales quotes into our CRM
- Easier to maintain pricing and configurations vs. current Excel spreadsheets
- Collect and analyze sales quoting analytics
- Standardize discounting policy
- Automatically generate consistent, professional looking sales proposals
- Dramatically reduce the time needed for sales reps to create quotes
- Eliminate sales quoting errors
- Reduce order rejections due to configuration/pricing errors
- Provide channel partners with better tools to create quotes on their own
- Gather insights on partner sales quotes



2. Scope

Map sales configuration logic to CPQ's Guided Selling process for

- Direct sales teams
- Channel partners
- Special requirements – e.g., vertical markets, geographies

Implement pricing structure/price lists for:

- Direct sales
- Channel partners (per level)
- Geographic factors

Integration with internal systems:

- CRM
- Other (*include other systems, if needed*)

Standardize proposal documents

Implement approval process



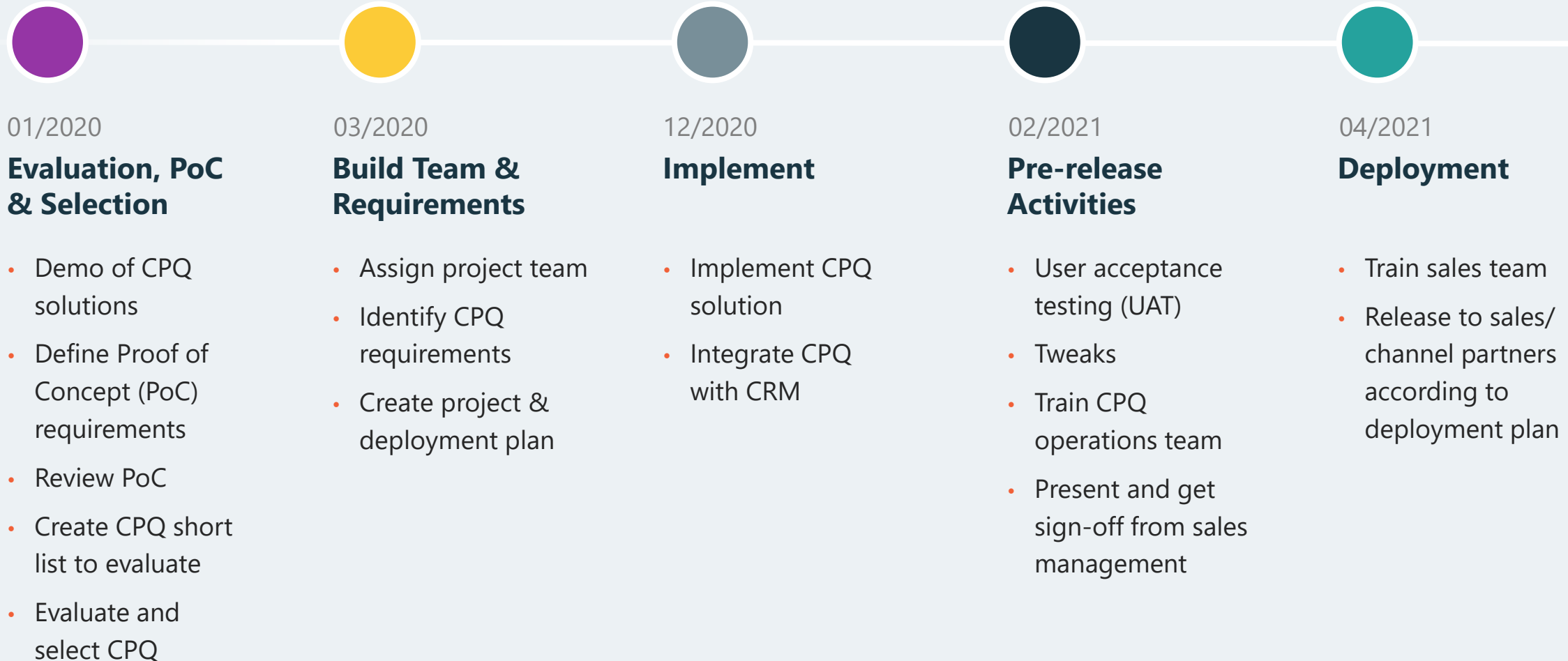
3. Project Team

Role	Team Member
Project Manager	<i>(Sales, Operations)</i>
Content Experts	<i>(Sales, Pre-Sales, Order Entry, Operations)</i>
Testers/Reviewers	<i>(Sales, Pre-Sales, Order Entry, Operations)</i>
CRM Integration	<i>(CRM Admin, IT)</i>
Approvers	<i>(Sales, Pre-Sales, Management, Order Entry, Operations, IT)</i>

4. Stakeholders

Role	Name
Management Sponsor	
Business 1	
Business 2	
Business 3	
Business 4	

5. Timeline



+

(include all that apply)

Timeline Dependencies

- Scheduling of “sales knowledge” sources (sales/pre-sales) to prepare requirements
- Mapping of sales knowledge into the CPQ’s guided selling process
- Changes to pricing structure/CRM changes coinciding with implementation of the CPQ sales quoting solution
- Scheduling of User Acceptance Testing (sales reps)
- Scheduling of training for Sales operations
- Scheduling of training for sales teams and sales leaders
- End-of-quarter sales pressures
- Other projects that might impact the CPQ project

6. Cost Estimates

Role	Amount
CPQ software (<i>subscription</i>)	
Set-up and implementation (<i>by CPQ vendor</i>)	
Set-up and implementation (<i>internal costs</i>)	
Internal Sales Training (<i>if applicable</i>)	
Yearly maintenance & support	
TOTAL	TOTAL

+

Include any assumptions that need to be taken into account of in the project.

7. Assumptions

- Assumption 1
- Assumption 2
- Assumption 3
- Assumption 4
- Assumption 5

8. Next Steps

- Next Step 1
- Next Step 2
- Next Step 3
- Next Step 4
- Next Step 5

Include next steps following this briefing.





About DealHub CPQ

DealHub is a digital work hub for Sales: a unified platform for all sales engagements throughout the sales process. Dealhub CPQ (Configure-Price-Quote) solution provides advanced pricing and proposal functionality, without the cost and complexity of traditional CPQ solutions.

The DealHub advanced customer engagement interface provides sales reps with a richer, more personalized way to interact with customers and gain insights on how their deal is progressing.

An enterprise-grade SaaS solution, DealHub CPQ comes pre-packaged with a wide and comprehensive array of built-in functionality that can quickly and easily be configured to suit different sales models without coding and without a long costly implementation project.





FREE PoC

Interact with a fully functioning “Proof of Concept”. In just 48-hours you’ll see:

- Customized “Guided Selling” for your products, services and business processes
- Quote created with your configuration rules and pricing
- Approval workflows based on your policies
- Dynamically generated Word, PDF or Excel proposals based on your content

Schedule Now!



FREE PoC in 48 hours



Schedule Your PoC