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Salesforce CPQ Health Check Guide

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Do you need to know if your Salesforce CPQ is operating at its full potential? Many Salesforce CPQ users face challenges like:

- **Inaccurate quotes and pricing errors**
- **Slow quote turnaround times**
- **Difficulty managing complex product configurations**
- **Limited user adoption and low team satisfaction**

These issues can significantly impact your sales efficiency and lead to lost revenue.

That's why we've created this Salesforce CPQ Health Check. This assessment will help you identify any areas for improvement in your CPQ configuration and unlock the platform's true potential.

What is Salesforce CPQ Health Check?

Salesforce CPQ Health Check evaluates the configuration and performance of Salesforce CPQ (Configure, Price, Quote) to identify potential issues and optimization opportunities. It assesses product and price rules, configuration attributes, approval processes, and overall system performance, providing recommendations to improve efficiency, accuracy, and user experience within the CPQ system.

Key Components:

Pricing Accuracy

Evaluates the correctness and consistency of pricing rules, discount schedules, and price calculations to ensure accurate quotes and prevent revenue leakage.

Product Configuration

Assesses the setup of product bundles, configuration rules, and constraints to ensure valid, feasible, and customer-specific product configurations.

Quote Generation Speed

Measures the time taken to create and process quotes, identify bottlenecks, and optimise performance for quicker quote delivery.

System Integration

Reviews the integration with other systems like ERP, CRM, and third-party applications to ensure seamless data flow and operational efficiency.

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Benefits of Regular CPQ Health Check

- ✓ Ensures accurate pricing and prevents revenue loss.
- ✓ Enhances product configuration to meet customer needs.
- ✓ Improves quote generation speed and efficiency.
- ✓ Identifies and resolves system performance bottlenecks.
- ✓ Ensures seamless integration with other business systems.
- ✓ Optimizes overall CPQ system reliability and user experience.



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Checklist for Assessing Current CPQ Setup

<input checked="" type="checkbox"/> Product CatLog	<ul style="list-style-type: none">• Are all products correctly categorized with up-to-date specifications and pricing?• Are bundles and configurations accurately represented and functioning correctly?
<input checked="" type="checkbox"/> Pricing Configuration	<ul style="list-style-type: none">• Are pricing rules current and reflective of the latest business strategies?• Are there any outdated or unused price books that could confuse?
<input checked="" type="checkbox"/> Discount and Approval Rules	<ul style="list-style-type: none">• Do discount structures and approval matrices align with current sales policies?• Are the thresholds for automatic approvals and escalations set appropriately?
<input checked="" type="checkbox"/> Quote Templates	<ul style="list-style-type: none">• Are quote templates designed and do they convey all necessary information professionally?• Are all required custom fields included and correctly populated in the templates?
<input checked="" type="checkbox"/> User Roles and Permissions	<ul style="list-style-type: none">• Are user roles and permissions correctly assigned to balance operational efficiency and system security?• Do users report any access issues that hinder their workflow?
<input checked="" type="checkbox"/> Integration Points	<ul style="list-style-type: none">• Are integrations with other systems (CRM, ERP) functioning properly without data inaccuracies?• Are there any synchronization issues or delays impacting the CPQ process?
<input checked="" type="checkbox"/> System Performance Metrics	<ul style="list-style-type: none">• What are the average times for generating quotes and loading complex configurations?• Have there been any system crashes or significant slowdowns reported?

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Identify CPQ Issues

Q Delays in Quote Generation	<ul style="list-style-type: none">• How long does it typically take to generate a quote, and how does this compare to industry standards?• Are complex pricing rules or extensive product options contributing to these delays?
Q Problems with Product Rules	<ul style="list-style-type: none">• Are there any conflicts or errors in product configuration rules that prevent users from completing quotes?• What common issues related to product configurations have been reported by users?
Q User Experience Feedback	<ul style="list-style-type: none">• What are the common challenges and frustrations faced by users as per recent surveys or interviews?• Is there a pattern in the feedback that highlights specific areas needing improvement?
Q Performance Bottlenecks	<ul style="list-style-type: none">• Are there specific steps in the quote process where delays are consistently observed?• What system monitoring tools are in place, and what do they reveal about performance bottlenecks?

By answering these questions, you'll be able to identify if your CPQ is optimized or not. Additionally, you'll be able to define what areas need improvement.



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If you're facing any difficulties resolving issues, see how our comprehensive health check analyzes your CPQ configuration across several key aspects:

Step-by-Step Guide to Performing a Salesforce CPQ Health Check :

1. Configuration Accuracy

Product & Option Management	<ul style="list-style-type: none">● Review product and option structures for accuracy and completeness.● Verify pricing rules are configured correctly and reflect current pricing models.
Pricing Validation	<ul style="list-style-type: none">● Analyze a sample of quotes to ensure they accurately reflect product configurations, discounts, and taxes.● Identify any discrepancies between quoted prices and actual product information.
Discount & Quote Management	<ul style="list-style-type: none">● Evaluate discount application rules and approval workflows for proper functionality.● Assess if the approval process aligns with your organization's quoting procedures.

2. Process Efficiency

Quoting Workflow Mapping	<ul style="list-style-type: none">● Chart the complete quoting process, identifying each step and potential bottlenecks.● Analyse user actions, approvals, and data flow to pinpoint delays.
Automation Effectiveness	<ul style="list-style-type: none">● Review existing automation rules and workflows within CPQ.● Identify opportunities to automate repetitive tasks like product configuration or quote generation.
User Interface & Navigation	<ul style="list-style-type: none">● Evaluate user experience with CPQ forms, layouts, and navigation.● Identify any complexities or areas that hinder user adoption and efficient quote creation.

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3. User Adoption & Training

User Permission Analysis	<ul style="list-style-type: none">● Review user roles and permissions within CPQ, ensuring users have appropriate access to features relevant to their roles.● Identify any unnecessary permissions that could pose security risks.
User Training Assessment	<ul style="list-style-type: none">● Evaluate the effectiveness of current training materials and resources for CPQ users.● Assess if additional training or knowledge-sharing sessions are needed for specific functionalities.

4. Integration & Automation

Integration Health Check	<ul style="list-style-type: none">● Review integrations between CPQ and other Salesforce applications or external systems.● Identify and troubleshoot any data synchronization issues or connectivity problems.
Automation Review	<ul style="list-style-type: none">● Analyze existing automation rules and workflows for effectiveness.● Identify opportunities to improve automation logic and streamline data flow.

5. Security & Compliance

Security Configuration Review	<ul style="list-style-type: none">● Assess your CPQ configuration for potential security vulnerabilities, ensuring adherence to data security protocols.● Review field-level security settings and data encryption practices.
User Access & Permissions	<ul style="list-style-type: none">● Evaluate user access controls and permissions within CPQ.● Identify any excessive access privileges that could pose security risks.

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6. Reporting & Recommendations

Compile Findings	<ul style="list-style-type: none">• Consolidate your assessment results from each area into a comprehensive report.• Include details on identified issues, potential risks, and optimization recommendations.
Prioritize Recommendations	<ul style="list-style-type: none">• Based on the severity and impact, prioritize recommendations for improvement.• Consider factors like potential ROI, user impact, and alignment with business goals.
Develop Action Plan	<ul style="list-style-type: none">• Create a clear action plan outlining the specific steps needed to address the identified issues and implement recommendations.• Assign ownership and timelines for each action item.

SCHEDULE YOUR **FREE CONSULTATION** WITH A SALESFORCE CPQ CONSULTANT TODAY TO DISCUSS YOUR HEALTH CHECK RESULTS AND DEVELOP A CUSTOMIZED OPTIMIZATION PLAN.



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