Gartner Peer Insights ‘Lessons Learned’: Implementing Configure, Price and Quote Application Suites

Published 11 June 2020 - ID G00728612 - 6 min read

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Initiatives: CRM Sales Technology

CPQ application suites enable organizations to streamline and optimize the creation of quotes and orders for complex, configurable products or services. Application leaders can learn from the implementation experience of their peers shared on Gartner Peer Insights.

Overview

Gartner Peer Insights is a free peer review and ratings platform designed for enterprise software and services decision makers. Reviews go through a strict validation and moderation process to ensure they are authentic.

We analyzed 101 Peer Insights reviews to identify lessons learned implementing configure, price and quote (CPQ) application suites. This report focuses on the responses to the questions: “If you could start over, what would your organization do differently?” and “What one piece of advice would you give other prospective customers?” To browse all reviews, see the full list of CPQ application suites’ reviews on Peer Insights.

Peer Lessons Learned

This edition of “Lessons Learned” summarizes clients’ firsthand experiences with implementing CPQ application suites. The peer advice results both from successful implementation projects and lessons based on what went wrong. This peer perspective, along with the individual detailed reviews, is complementary to expert research and provides a holistic view to the implementation process. Reviewers who submitted their lessons learned represent a cross-section of small- to midsize and large organizations. (See Figure 1.)
Below are some key lessons learned and most cited recommendations by Peer Insights reviewers to help application leaders in their CPQ application suites’ implementation process.

**Lesson 1: Design Your CPQ Application Suite Architecture per the Organizational Requirements**

Peer reviewers recommend application leaders to spend a good amount of time building their architectural design keeping in view the organizational requirements. Understanding business requirements based on future scalability is extremely important per the peers. The members also recommend organizations to define their internal processes clearly to ease the implementation process.

A peer recommends:

> Work extensively on a roadmap taking into account the capacity of the solution in comparison to the business requirements in order to have a very good definition of the scope of work.

— **CIO, Manufacturing Sector**
Another peer suggests:

Map out your goal and strategy. Having key objectives laid out first (i.e. core products, key functionality and target customers) makes development of the program much easier.

— Business Professional, Manufacturing Sector

Peer recommendations include:

- Understand your business needs keeping future scalability in mind.

- Focus on simplifying your organization’s internal process as much as possible before you move on to the implementation phase.

- Assess upfront the cost you would need for product customization so that it meets your business objectives.

Recommended reading:

“Best Practices for a Successful Configure, Price and Quote Implementation”

Lesson 2: Verify the Application’s Performance Before Selecting the Product

Evaluating different vendors before finalizing the most suitable product for your organization is a common suggestion given by peer members. Most importantly, they stress on testing the demo versions of the products to understand various features and functionalities before you lock in on one.

A peer reviewer conveys:

Demo products you shortlist and pilot them in a development environment first. Load a couple of pilot clients to it and really understand whether the workflows, rules and triggers fit to your business conditions.

— Program and Portfolio Management Professional, Education Sector
One peer further adds:

Products come with a demo version. So, prospective customers must check various features and functionalities they need in the product for their organizational requirement and accordingly make a decision whether to go for a product or not.

— Technical Professional, Service Sector

Peer recommendations include:

- Compare and evaluate all products to check which product is suitable for your organization.
- Discuss your needs and expectations with the vendor clearly and have them added in the contract; also, include in the contract if you want vendor’s support at any point.
- Ensure you do ample testing in real scenarios with the people who will be using the tool. Testing will help you understand the product’s features and functionalities holistically.

Recommended reading:

“Magic Quadrant for Configure, Price and Quote Application Suites”

“Critical Capabilities for Configure, Price and Quote Application Suites”

**Lesson 3: Dedicate Technically Competent Internal Resources to the Project**

Peer members recommend organizations to deploy adequate tech-savvy professionals from the outset to manage the CPQ project effectively. Not relying completely on the vendor and having in-house experts to handle difficult situations is imperative per the peers.

A peer recommends:

Ensure you have technically competent resources or at least someone with a lot of time to dedicate to configuring the administrative account. Once it is set up, the user experience is a breeze.
Another peer says:

Hire experienced CPQ veterans to deliver it. CPQ is complicated and one can commit a lot of costly mistakes if there are not experienced resources to help you through.

— Enterprise Architecture and Technology Innovation Professional, Communications Sector

Peer recommendations include:

- Deploy enough internal resources with technical background right from the start.

- Involve the sales team at the product planning stage; listen to their suggestions and incorporate them while buying and customizing the product.

- Plan and implement change management in your organization from the beginning.

Recommended reading:

“Best Practices for a Successful Configure, Price and Quote Implementation”

Lesson 4: Set Up Early Training to Drive End-User Adoption and Maximize Product Efficiency

Peers advocate training the end users at the earliest to maximize the CPQ product’s adoption and productivity. According to them, taking advanced learning on the product enables users to utilize all its features and functionalities.

A peer recommends:

Pay for additional training and professional services. This is often very
expensive, but there is nothing worse than having a slew of feature sets and unable to use them.

— Program and Portfolio Management Professional, Education Sector

One peer advises:

Ensure you get training set up for those that will use the product so that there are no issues in the transition or on-boarding process.

— Business Professional, Service Sector

Peer recommendations include:

- Build a learning timeline in the project life cycle. Anticipate that the learning curve will be a steep one.

- Ensure that the end users of CPQ application suites get a lot of advanced training from the beginning.

- Invest additional time in reading tutorials and watching configuration videos.

Lesson 5: Select an Expert Implementation Partner for the CPQ Application Suite

The peer members recommend organizations to select the implementation partner wisely. They also suggest building a comprehensive implementation strategy well in advance and go in a staggered manner.

A peer member suggests:

The entire setup and implementation process rely heavily on your implementation partner. Ensure that you are partnered with a vendor that you trust, and absolutely work out a contract that rests on completing set deliverables — if it isn’t time-based, costs can easily balloon.
Another peer recommends:

**Choose your integrator wisely. Many integrators can set up your instance, but you need to look specifically for the one who understands your business model thoroughly.**

— *Business Professional, Manufacturing Sector*

Peer recommendations include:

- Build a clear and comprehensive implementation strategy for your CPQ application suite.
- Implement the product in a phased manner to try and keep the process free of errors.
- Choose your implementation partner carefully and wisely. The partner should have prior experience specifically with CPQ application suites and must understand your business environment completely.

Recommended reading:

“Architecting a Modern Configure, Price and Quote Application”

**Methodology**

Of the Peer Insights survey data considered for this market, only those responses meeting the following criteria were included in this synthesis:

- Reviews less than 12 months old.
- Responses that pertain to the project experience and are not tied to the capabilities of a vendor.
- Reviews were clustered into the top-five most-referenced categories (lessons learned) and then listed in order of relevant phases in the project life cycle.

The results of this synthesis are representative of the respondent base and not necessarily the market as a whole.

Gartner, Inc. | 728612
Document Revision History

Peer Lessons Learned: Implementing Configure, Price and Quote Application Suites - 3 June 2019

Recommended by the Author

Magic Quadrant for Configure, Price and Quote Application Suites
Critical Capabilities for Configure, Price and Quote Application Suites
Best Practices for a Successful Configure, Price and Quote Implementation
Toolkit: RFP for Configure, Price and Quote Applications
How to Select a Configure, Price and Quote Vendor
Architecting a Modern Configure, Price and Quote Application
Innovation Insight for Visual Configuration
Maturity Model for Quote-to-Cash Technology

Recommended For You

Gartner Peer Insights 'Lessons Learned': Implementing Corporate Learning Suites
Gartner Peer Connect Perspectives: Must-Have Skills That an IT Leader Should Possess
Market Guide for Talent Acquisition Applications
How to Detect Fakes in a Zero-Trust World Using Artificial Intelligence and Blockchain
Toolkit: How to Select the Right Channel Partners for Resell and Support

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