



CPQ QUICK START

40

NAME	DESCRIPTION	TIME (DAYS)
✓ Requirements Gathering	<ul style="list-style-type: none">Time dedicated for a requirement gathering scoping session at project onset with a business analyst and technical Salesforce consultant.	1
✓ Requirement Documentation	<ul style="list-style-type: none">Write up of the detailed requirements defined during the scoping sessions into a Statement of Work (SoW) including solution design, architecture, user stories and time estimates.	2
✓ Installation and Setup - CPQ	<ul style="list-style-type: none">Installation of the Salesforce CPQ package into Salesforce. Setup security and assigning of licenses.	1
✓ Product Catalogue	<ul style="list-style-type: none">Standardisation of your product set. Configuration of up to 100 current product and future standalone products.	2
✓ Bundles	<ul style="list-style-type: none">Offer unique combinations of products and services that deliver what your customer needs. Configuration of up to 5 bundles to allow multiple components to make up bundles or specific products. Each bundle can contain up to 20 products. Maximum 3 option constraints per bundle.	2
✓ Pricing and Discounting	<ul style="list-style-type: none">Make sure your customers always receive accurate and consistent pricing. Configuration of up to five CPQ product pricing rules, five discount schedules, contracted prices & price dimensions.	2
✓ Output Documents & Custom Actions	<ul style="list-style-type: none">Configuration of up to 4 templates in the system to ensure that the user will be prompted to select the quotation template to be applied when the PDF document is created, and also the e-mail template that is to be applied for the document transmission. e.g. standard terms and conditions applied to template vs non-standard terms and conditions.	4
✓ Approvals	<ul style="list-style-type: none">Ensure business rules by automating quote approvals. Configure native Salesforce approval process for managers to sign off, based on specific criteria.	2
✓ Onsite Training	<ul style="list-style-type: none">Train the trainer on best practice usage of Salesforce CPQ functionality to get your users up and running.	1
✓ Project Management & Sprint Activities	<ul style="list-style-type: none">Total time dedicated to all calls, emails, meetings and ongoing communication throughout entirety of project alongside project management activities such as:<ul style="list-style-type: none">Requirement documentationSprint planning & reviewsCreating and maintaining the project planWeekly update reportsShowcasesSprint cadences	8
✓ UAT	<ul style="list-style-type: none">Time allocated to UAT that will be completed prior to user training. UAT will cover any time required for tweaks and reworks to the solution to ensure a strong deployment.	2
TOTAL DAYS		27.00