

# Quoting Best Practices for Industrial Manufacturing

The world relies on industrial machinery manufacturers, but even the most successful, long-established companies face threats from changing market conditions and new competitors. The rise of e-commerce and increasingly complex customer needs have also made the configuration, pricing, and quoting process even more difficult. Therefore, streamlining processes has become critical to success for industrial machinery manufacturers.

Is your sales team following today's best practices? Your process should:

## ☐ Resemble B2C e-commerce

A digital product catalog and order submission system can replicate the ease and convenience of online shopping for greater customer satisfaction and higher sales.



## ☐ Enable deep customization

Industrial machinery requires precise configurations and specifications to meet customer needs. Buyers should be able to conveniently make these custom orders without phone calls, meetings, or utilizing sales team resources.



## ☐ Follow rules-based configuration

Your configurator should be programmed to follow specific customization parameters so you can automate as much configuration as possible, without allowing inaccurate orders.



## ☐ Integrate with ERP and CRM

To streamline orders, automate backend processes, and reduce lead times, your industrial machinery configurator should integrate with ERP, CRM, and other manufacturing systems to eliminate manual data entry and reduce errors.



## ☐ Generate product visualization

Configurators should show customers exactly what their heavy duty machinery and industrial equipment will look like based on their specifications. This enhances customer experience and improves purchase confidence.



## ☐ Implement workflow automation

A rules-based calculation engine will accelerate pricing and quote generation times for a faster sales cycle, while also reducing quotation errors.



## Optimize industrial machinery quoting with CPQ

Configure, price, and quote (CPQ) software packages all of these configuration best practices into a single solution, streamlining customer experience, reducing errors, scaling volume, and optimizing the process for even the most complex orders. Configure One Cloud from Revalize is purpose-built to satisfy the most niche industries' needs, including industrial manufacturing.

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