



# Building Your Business Case for CPQ: A Strategic Template

Secure executive buy-in by aligning CPQ with your company's top business goals.

## Who this template is for:

IT, digital transformation, and operations leaders who are championing CPQ internally and need to build a compelling, metrics-driven business case that resonates with cross-functional stakeholders.

## Brought to you by Tacton:

We help manufacturers turn complex product portfolios into scalable, customer-centric sales experiences—powered by smart, strategic CPQ.



# How to Use This Template:

This template helps you position CPQ as a strategic investment. Use it to align with executive priorities and quantify real business impact.

## Use it in 3 Key Ways:

### 1. During CPQ Discovery

Use this template to organize insights from discovery sessions and map current pain points to strategic goals.

- ✓ Identify where quoting, configuration, and pricing challenges are impacting growth, margin, or efficiency.
- ✓ Capture real examples from sales, engineering, and IT to ground your case in day-to-day reality.

### 2. In Stakeholder Conversations & Workshops

Use it as a shared reference in cross-functional meetings.

- ✓ Align on what "success" looks like for each function (sales, IT, ops, finance).
- ✓ Document priorities, objections, and metrics that matter to each stakeholder.
- ✓ Start building internal champions by involving them in shaping the business case.

### 3. To Structure the Business Case

Turn your discovery and workshop inputs into a strategic, metric-driven proposal.

- ✓ Clearly tie CPQ capabilities to business outcomes like revenue growth, margin protection, and scale.
- ✓ Recommend a pilot with defined scope, KPIs, and timeline.
- ✓ Anticipate and address objections with IT, finance, and leadership in mind.

# [Template] CPQ Business Case

## The Project Team

CPQ Project Owner:

Project Stakeholders:

## 1. Define Strategic Goals

How the CPQ project aligns with 2-3 short-term and/or long-term strategic initiatives your company is prioritizing.

Strategic Goal	How CPQ Supports This Goal
<i>Example: Become the leader in customer experience</i>	
<i>Example: Expand into new international markets</i>	
<i>Example: Improve dealer enablement</i>	

## 2. Map Operational Impact (Before vs. After)

What does a typical quote-to-order process look like today? What changes with CPQ?

Workflow Area	Current State	Future State (With CPQ)
Quoting Process		
Engineering Involvement		
Pricing & Discounting		
Customer/Dealer Experience		

### 3. Quantify the Expected Impact

Estimate improvements based on benchmarks, vendor input, or internal goals.

Metric	Current Value	Target Value with CPQ	Expected Impact (%) or \$
<i>Example: Quote turn around time</i>		<i>Example: Reduce quote turnaround time from 8 days to 3 days</i>	
<i>Example: Order Error Rate</i>			<i>Example: Decrease error-related rework costs by \$250,000 annually.</i>
<i>Example: Average Order Value</i>			
<i>Example: Margin Increase</i>			

### 4. Identify a Pilot Use Case

Start with a limited scope to prove value before scaling.

Pilot Scope (product line, region, team):

Key Success Metrics (e.g., time to quote, deal value):

## Timeline & Milestones:

Milestone	Type	Description	Target Date	Dependencies
<b>Project Kickoff</b>	Planning	<i>Example: Core team defined, initial use case confirmed</i>	<i>Month/Year</i>	<i>Example: Stakeholder buy-in</i>
<b>Viable Pilot</b>	MVP/Proof of Concept	<i>Example: Config logic, pricing, and approvals functioning</i>	<i>Month/Year</i>	<i>Example: MVP rules complete</i>
<b>Phase 1 Go-Live</b>	Launch	<i>Example: Pilot product line live in one region/channel</i>	<i>Month/Year</i>	<i>Example: CRM/ERP integration</i>
<b>Phase 2 Scale</b>	Expansion	<i>Example: Add CAD/3D, more SKUs, new channels</i>	<i>Month/Year</i>	<i>Example: Training, adoption</i>
<b>Optimization</b>	Continuous Improvement	<i>Example: Refinement, analytics, rule clean-up, governance</i>	<i>Month/Year</i>	<i>Example: User feedback loop</i>

## 5. Build Cross-Functional Alignment

List stakeholders and potential executive sponsors across departments.

Function	Stakeholder Name	Role in Project	Priority/Concern
Sales			
Engineering			
IT			
Finance			
Product/ Marketing			

## 6. Build Your Cost-Benefit Story

Tangible Benefits:

Benefit	Estimated Savings (\$/year)
<i>Example: Fewer Order Errors</i>	
<i>Example: Faster Quote Approvals</i>	
<i>Example: Margin Protection</i>	
<i>Example: Shorter Sales Cycles</i>	

## Intangible Benefits:

Benefit	Estimated Savings (\$/year) OR impact
<i>Example: Increased Customer Satisfaction</i>	
<i>Example: Improved Brand Consistency</i>	
<i>Example: More time for Engineering Innovation</i>	
<i>Example: Better Cross-team Collaboration</i>	

## 7. Assess Your Data Readiness

Check where your data lives and whether it's ready to support automation.

Data Type	Source System(s)	Data Quality	Gaps or Risks
<b>Product Configuration</b>			
<b>Pricing &amp; Discounts</b>			
<b>Customer Accounts</b>			

## 8. Prepare for Executive Objections

Anticipate and plan responses to common concerns.

Objection	Suggested Response
<i>Example: We already have a CRM/ERP.</i>	
<i>Example: It sounds too complex to manage.</i>	
<i>Example: We can't add more IT burden.</i>	