

## ● CASE STUDY

# Yagna IQ: Streamlined Sales with CPQ

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How we helped enterprise customers automate quote generation, simplify complex product configurations, and accelerate sales cycles.



Industry

Enterprise Technology / SaaS



Solution Area

Configure-Price-Quote (CPQ)

“ Before Yagna IQ, generating quotes was slow and error-prone”







Begin Case Study

# Customer Challenges & Objectives






Yagna IQ provides advanced CPQ solutions to enterprise customers across multiple industries, helping them streamline sales processes and overcome operational challenges.

## Challenges Faced

-  **Time-Consuming Quote Generation**  
Sales reps spent 2-3 hours per quote manually calculating discounts
-  **Complex Configuration Errors**  
Product configurations caused frequent errors, requiring rework
-  **Approval Delays**  
Non-standard discount approvals delayed closures by several days
-  **Limited Visibility**  
Insufficient pipeline and revenue forecast visibility

*"Before Yagna IQ, generating quotes was slow, error-prone, and frustrating."*

## Objectives

-  **Automate Quote Generation**  
Reduce errors and accelerate approvals
-  **Simplify Product Configuration**  
Enable guided selling for complex products
-  **Standardize Pricing & Discounts**  
Ensure compliance and consistent approach
-  **Improve Collaboration**  
Enhance coordination between sales, finance, and operations
-  **Gain Actionable Insights**  
Enable data-driven decisions

# Yagna IQ CPQ Solution Features

Yagna IQ delivered a customized CPQ platform integrated with customers' CRM and ERP systems, addressing their specific challenges.



## Dynamic Product Configuration

- ✓ Guided selling ensures valid product combinations
- ✓ Supports multi-level options and add-ons



## Automated Pricing & Discounts

- ✓ Real-time calculations for regional pricing
- ✓ Configurable approval workflows for non-standard pricing



## Fast Quote Generation

- ✓ Professional templates generate quotes in minutes
- ✓ CRM integration for accurate tracking



## Analytics & Reporting

- ✓ dashboards for quote conversion and revenue forecasts
- ✓ Enables data-driven decisions



## Scalability

- ✓ Easily configurable to add 50+ new SKUs or expand to new geographies without manual work

## Implementation Approach

1

Assessment & Design

2

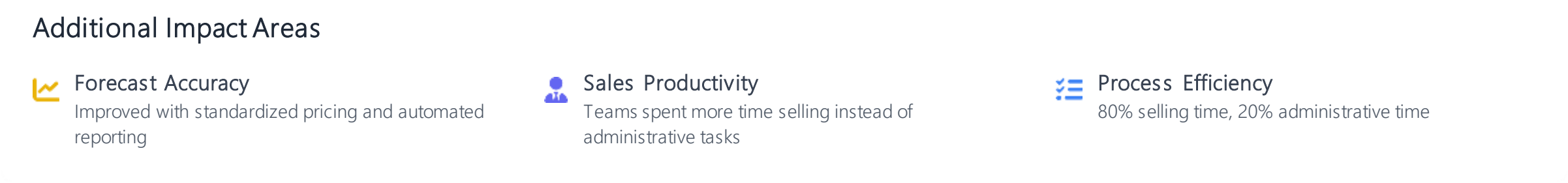
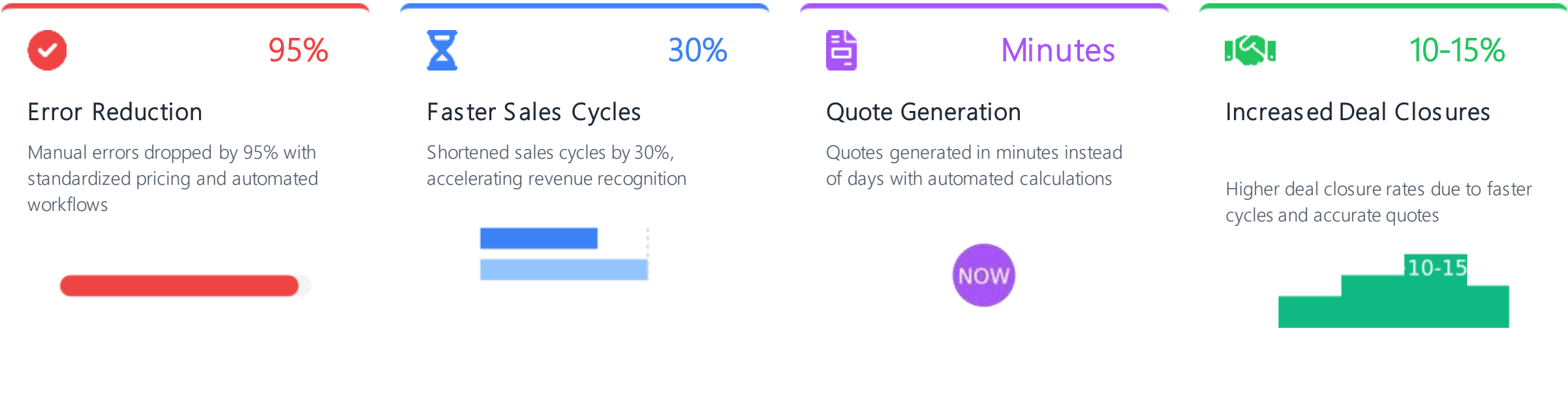
Development & Integration

3

Testing & Adoption

# Implementation Results & Impact

After implementing Yagna IQ's CPQ solution, customers achieved significant improvements in efficiency, accuracy, and sales performance.



# Key Success Factors & Takeaways

## Key Success Factors



### Clear Configuration Rules

Well-defined rules ensure valid product combinations and approval workflows



### Early Sales Team Training

Proper training ensures faster adoption and smoother implementation



### Seamless System Integration

Integration with CRM/ERP minimizes workflow disruptions

*"The implementation was straightforward, and our team adapted quickly."—  
Operations Lead, Manufacturing Client*

## Measurable Impact



## Key Takeaways

- ✓ CPQ automation reduces errors by 95% and accelerates sales cycles by 30%
- ✓ Guided configuration ensures valid, optimized product combinations
- ✓ Integration with CRM/ERP creates seamless workflows
- ✓ Real-time analytics enable data-driven decisions

Yagna IQ's CPQ solution helped customers boost productivity, revenue predictability, and competitiveness, making CPQ an essential tool for modern sales operations.