tacton

Welcome to Tacton Summit 2024

Agenda

09:30-09:45	**Opening** Jeff Summers, CCO Tacton
09:45-10:45	**Tacton CPQ Product Vision,** Jesper Alfredsson CPO Tacton
	10:45-11:15 Coffee break and mingle
11:15-11:45	**A Journey Into Tacton's Latest Innovations,** Anders Forsberg
11.45-12.15	**Tacton Integrations,** Mathias Roitto
	12:15-13.45 Lunch and networking
13:45-14:15	**Guided Selling,** Johan Jacobsson
14:15-14:45	**Omnichannel Sales,** Per Rohdin
14:45-15:00	**Sum up and Closing**, Jeff Summers CCO Tacton

tacton

Tacton CPQ Product Vision

Jesper Alfredsson, CPO Tacton

Tacton Summit 2024

tacton

THE BUYER-CENTRIC SMART FACTORY

ERP

CRM

SCM

DIFFERENTIATED BUYER ENGAGEMENT

Guided Product Selection

- Outcome Based Configuration
- Services Configuration
- Pricing Consistency & Optimization
- Visualization & Layout
- Sustainability Impact

Internal Expertise Amplified with Artificial Intelligence

Omnichannel Access, Coordination, & Consistency

Insights & Analytics Spanning ALL Channel Interactions

CAD

PLM

BI

tacton

Product Launches

Tacton Summit 2024

Service Sales

1. Installed Base (via API)

2. Configured Service

3. Category Pricing

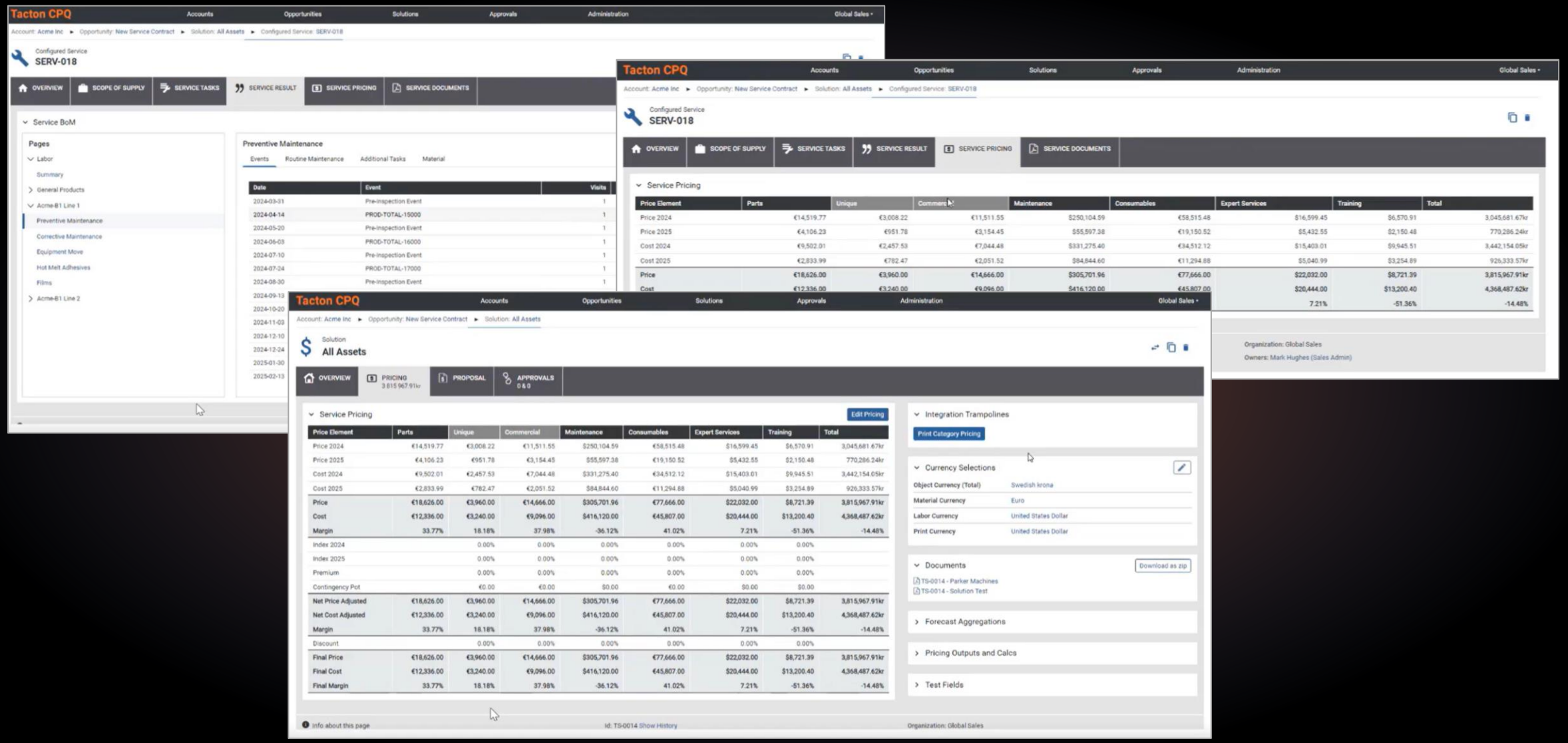
2.1 Asset Scope and Roles

2.2 Service Products

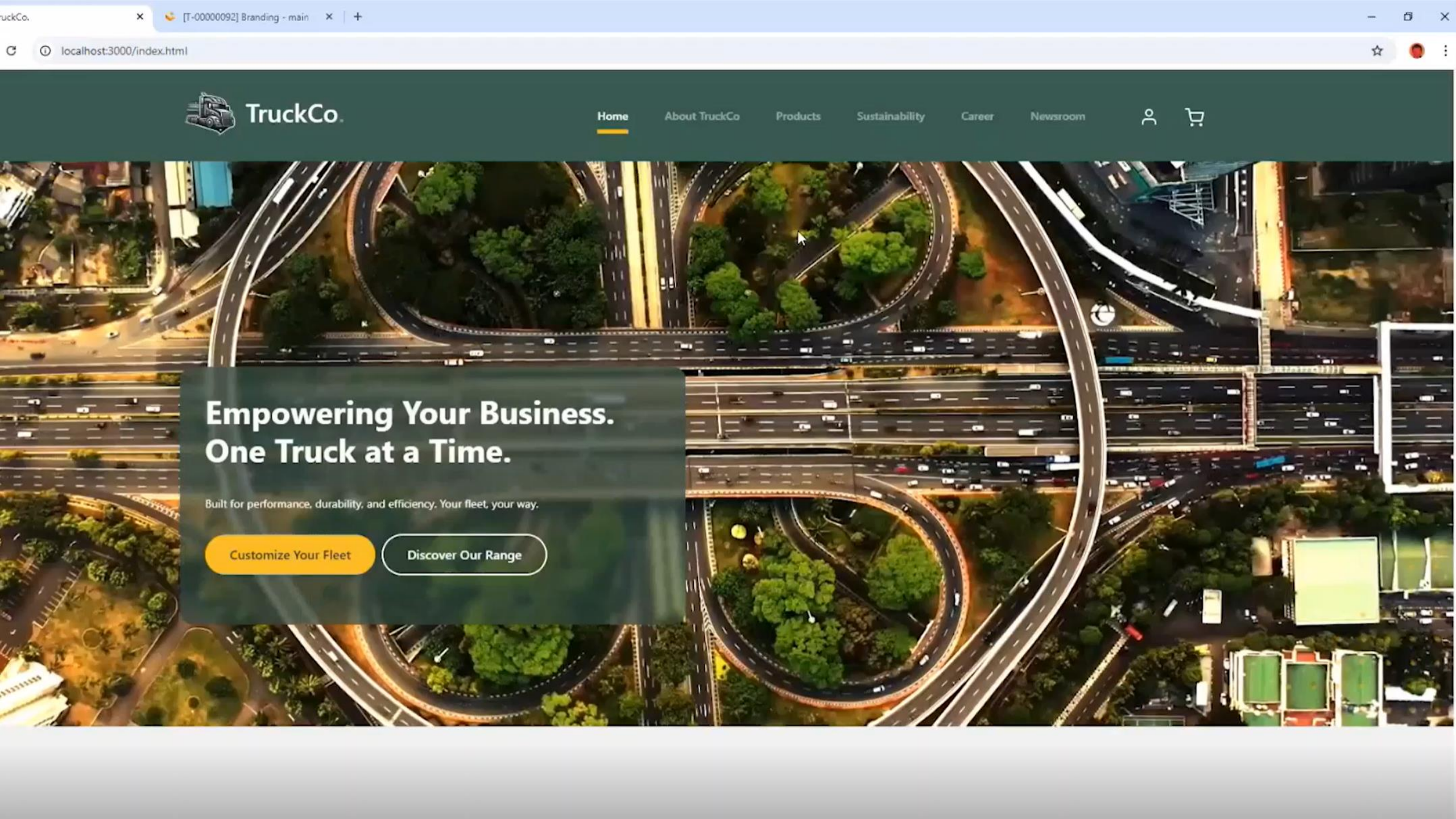
- Preventive Maintenance
- Corrective Maintenance
- Consumables
- Catalog products
- Trainings

2.3 Services Scheduling

Service Sales



Self-Service Channels


TruckCo.
Home
About TruckCo
Products
Sustainability
Career
Newsroom
Empowering Your Business.
One Truck at a Time.
Built for performance, durability, and efficiency. Your fleet, your way.
Customize Your Fleet
Discover Our Range

TruckCo.

Home | About TruckCo | Products | Sustainability | Career

Model S

Navigation goes here

Visualization goes here

Configuration panel

UI COMPONENTS

SHOULD GO HERE

server.js | index.html | tacton.css | configure.html | setup.txt | style.css | token-service.js | README.md | private.key

```
<html lang="en">
    <body class="config">

        <!-- ADD Configuration Panels -->
        <div class="config">
            <div class="row">
                <div class="col-md-12">
                    <h2>Model S</h2>
                </div>
            </div>
            <div class="row config-row">
                <div class="col-md-7">
                    Navigation goes here
                </div>
                <div class="col-md-5 config-main">
                    Visualization goes here
                    <div class="config-panel">
                        <tacton-configuration-panel product_name="truck"></tacton-configuration-panel>
                    </div>
                </div>
            </div>
        </div>
        <!-- End Configuration -->

        <script src="js/bootstrap.bundl
        <script src="js/tiny-slider.js"
        <script src="js/custom.js"></sc
```

ADDING CODE SNIPPETS

html › body.config › div.config › div.row.config-row › div.col-md-5.config-main › div.config-panel › tacton-configuration-panel

Configure | [T-00000092] Branding - main

localhost:3000/configure.html

TruckCo.

Home | About TruckCo | Products | Sustainability | Career | Newsroom

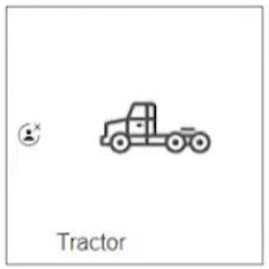
Model S

avigation goes here

Visualization goes here

OPERATIONS

Vehicle type



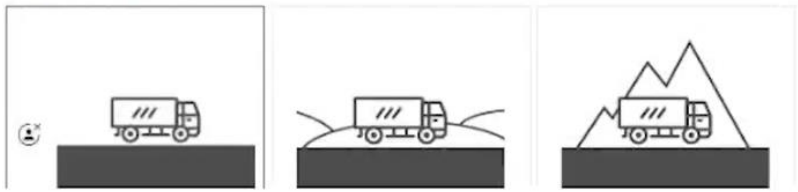
Application

Volume restricted goods

ENVIRONMENT

Traffic conditions

Topography



Configure | [T-00000092] Branding - main

localhost:3000/configure.html

TruckCo.

Home | About TruckCo | Products | Sustainability | Career | Newsroom

Model S

Start | Side | Interior | Top

Customer needs | Chassis | Body | Fuel Tanks | Powertrain | Cab | Auxiliary items | Services

OPERATIONS

Vehicle type

Tractor

Truck (single-unit)

Application

Volume restricted goods

ENVIRONMENT

Traffic conditions

No traffic

Easy traffic

Heavy traffic

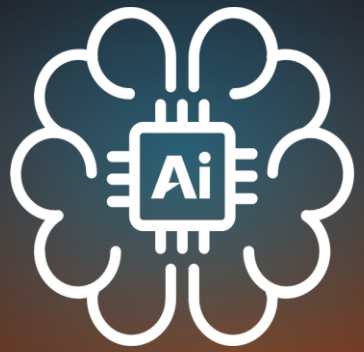
Topography

tacton

New Technology

Tacton Summit 2024

Expertise Amplified with AI

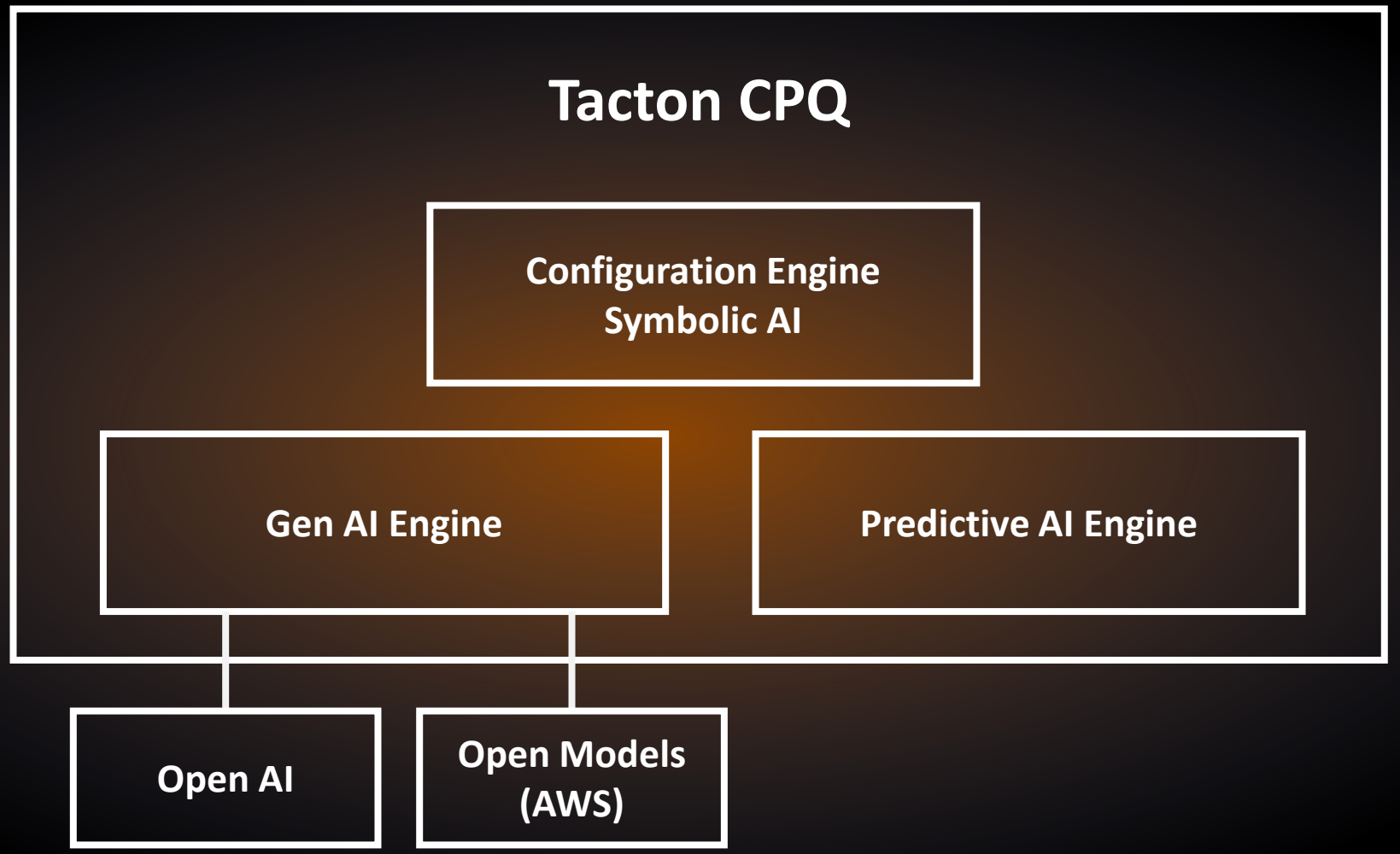


Predefined
Symbolic

Predictive
Machine Learning

Preemptive
Generative

New AI Engines



New Integration Platform

powered by

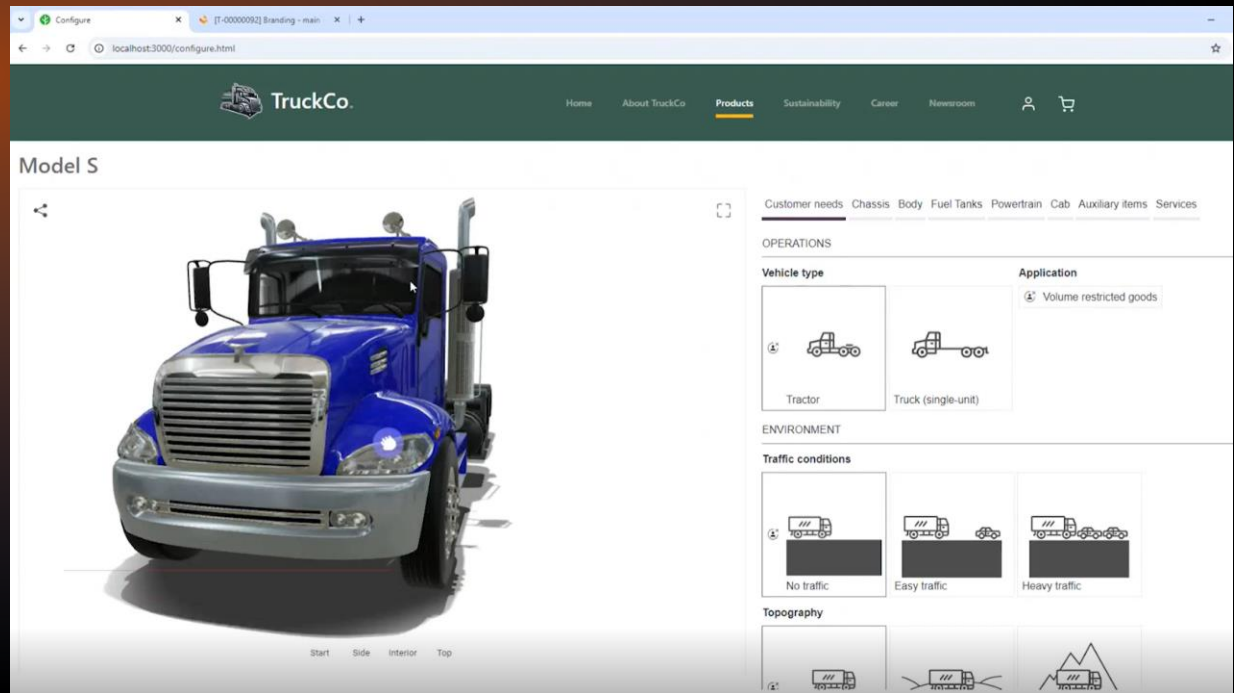
tacton

Coffee break until 11:15

Tacton Summit 2024

Self Service Channels

- A new option for Tacton CPQ
- An easy, and fast way to tailor user experience for specific channels with the on the Tacton CPQ
- Future proof for coming Tacton CPQ features
- Available from today



tacton

A Journey Into Tacton's Latest Innovations

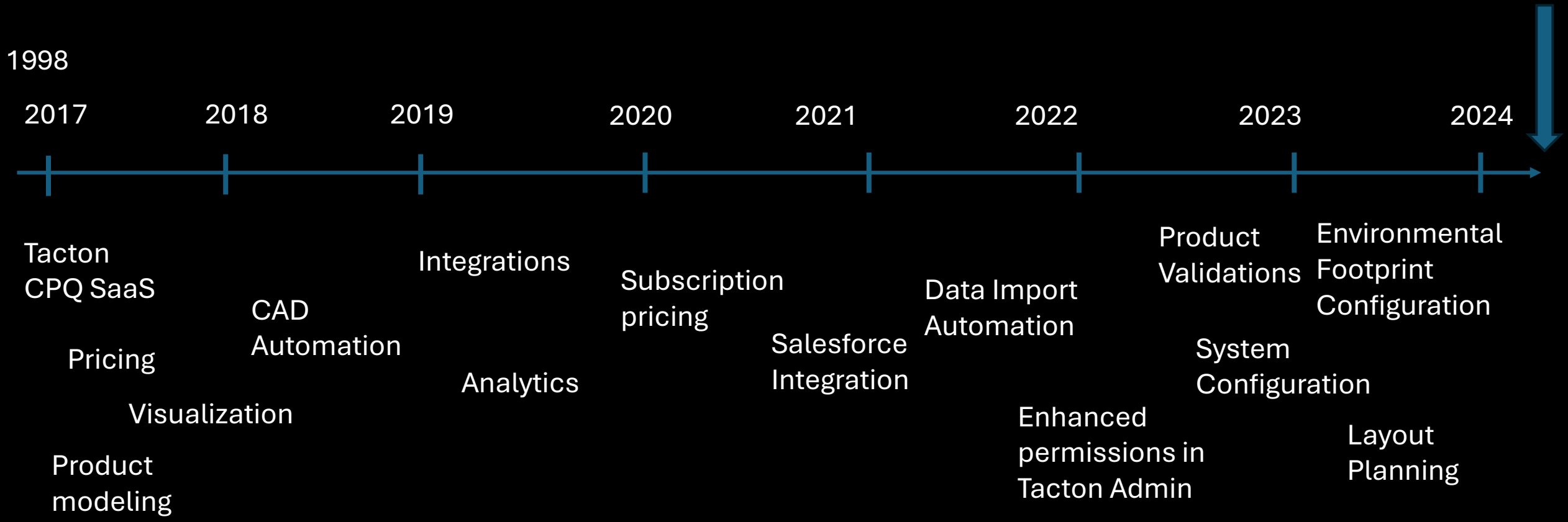
Anders Forsberg, Product Manager Tacton

Tacton Summit 2024

Tacton has a long history of innovation

Gartner Magic Quadrant for CPQ 2023:

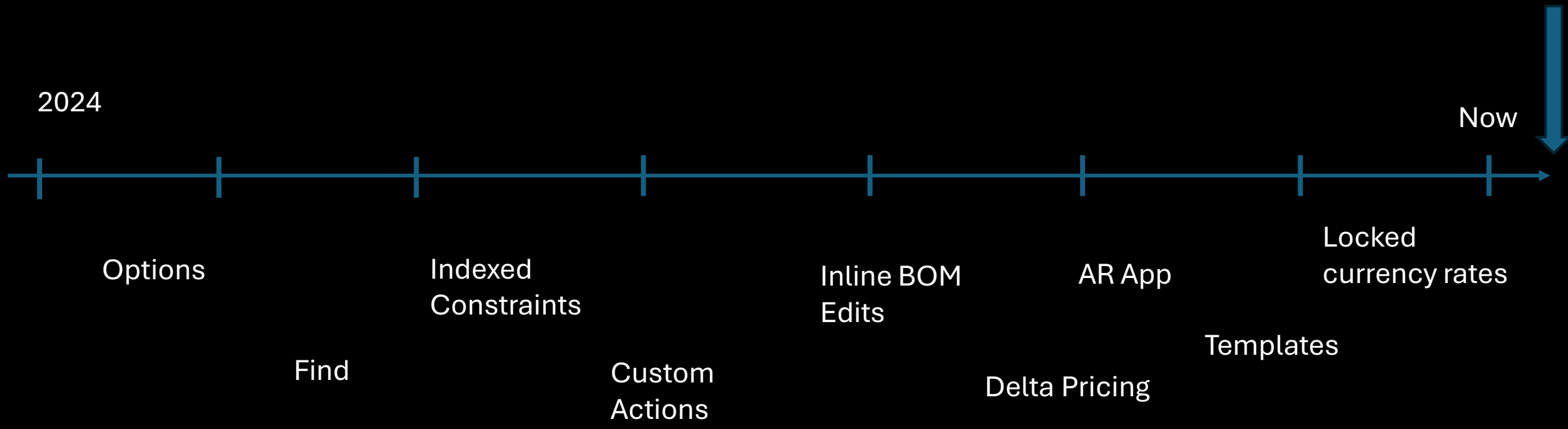
- **Innovation:** Tacton CPQ is the most innovative product evaluated for this Magic Quadrant.



Tacton has a long history of innovation

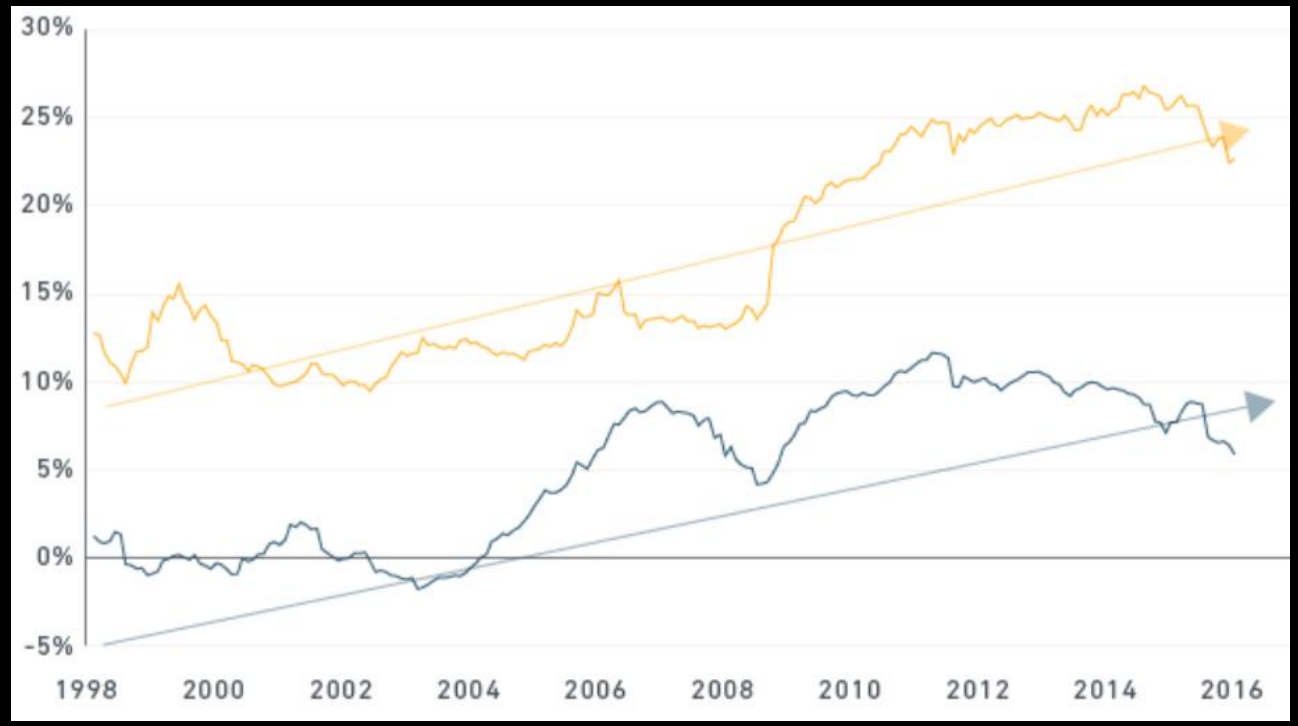
Gartner Magic Quadrant for CPQ 2023:

- **Innovation:** Tacton CPQ is the most innovative product evaluated for this Magic Quadrant.



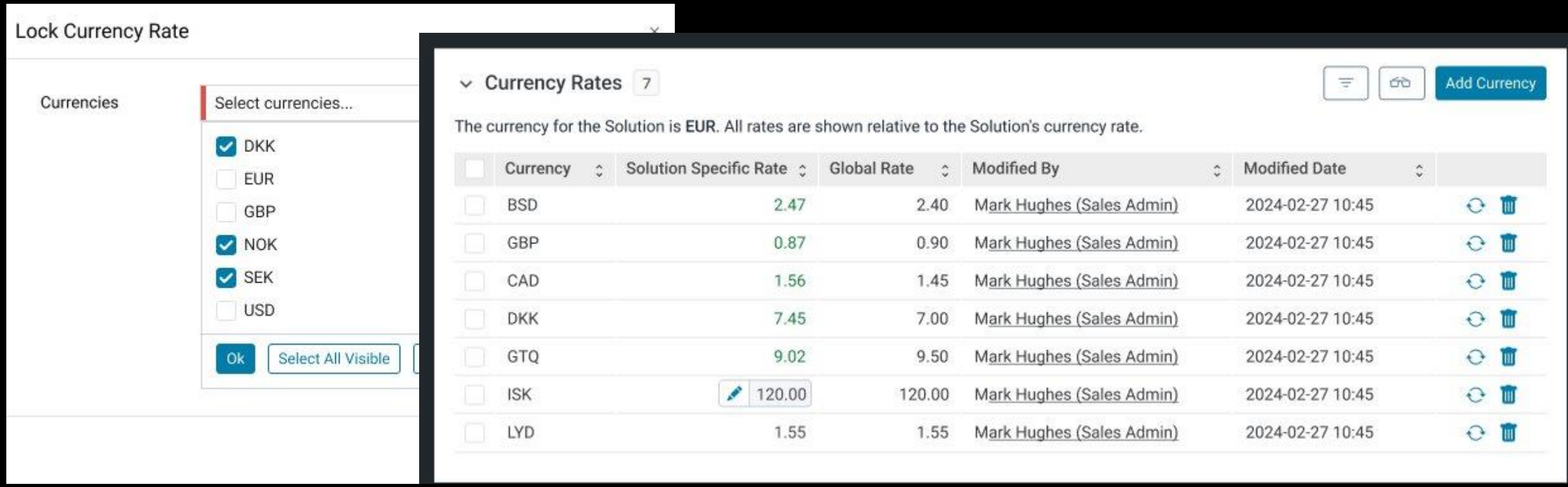
Locked Currency Rates

Long deal cycles will expose you to currency exchange rate risk



Locked Currency Rates

Lock rates and hedge currency exchange rate risk

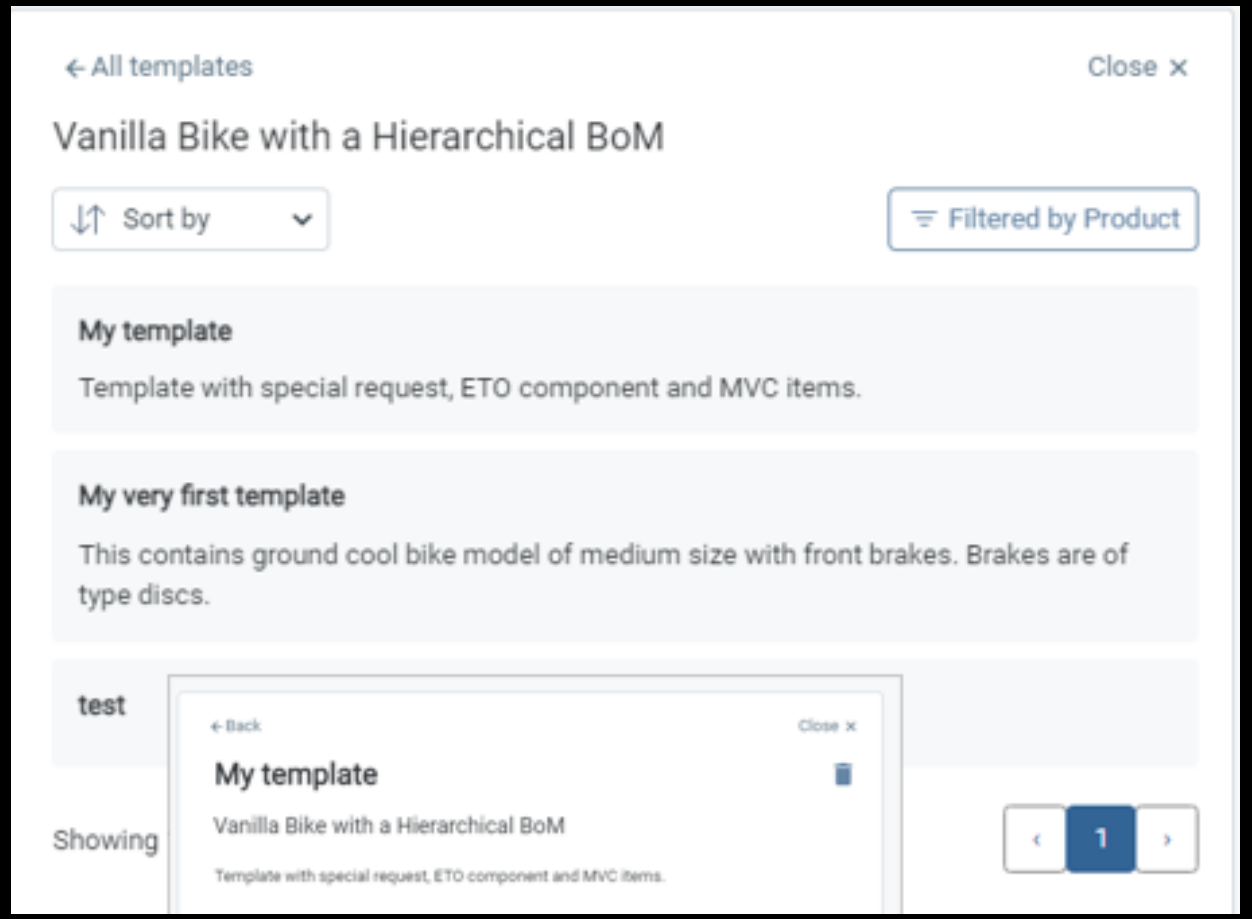


Templates

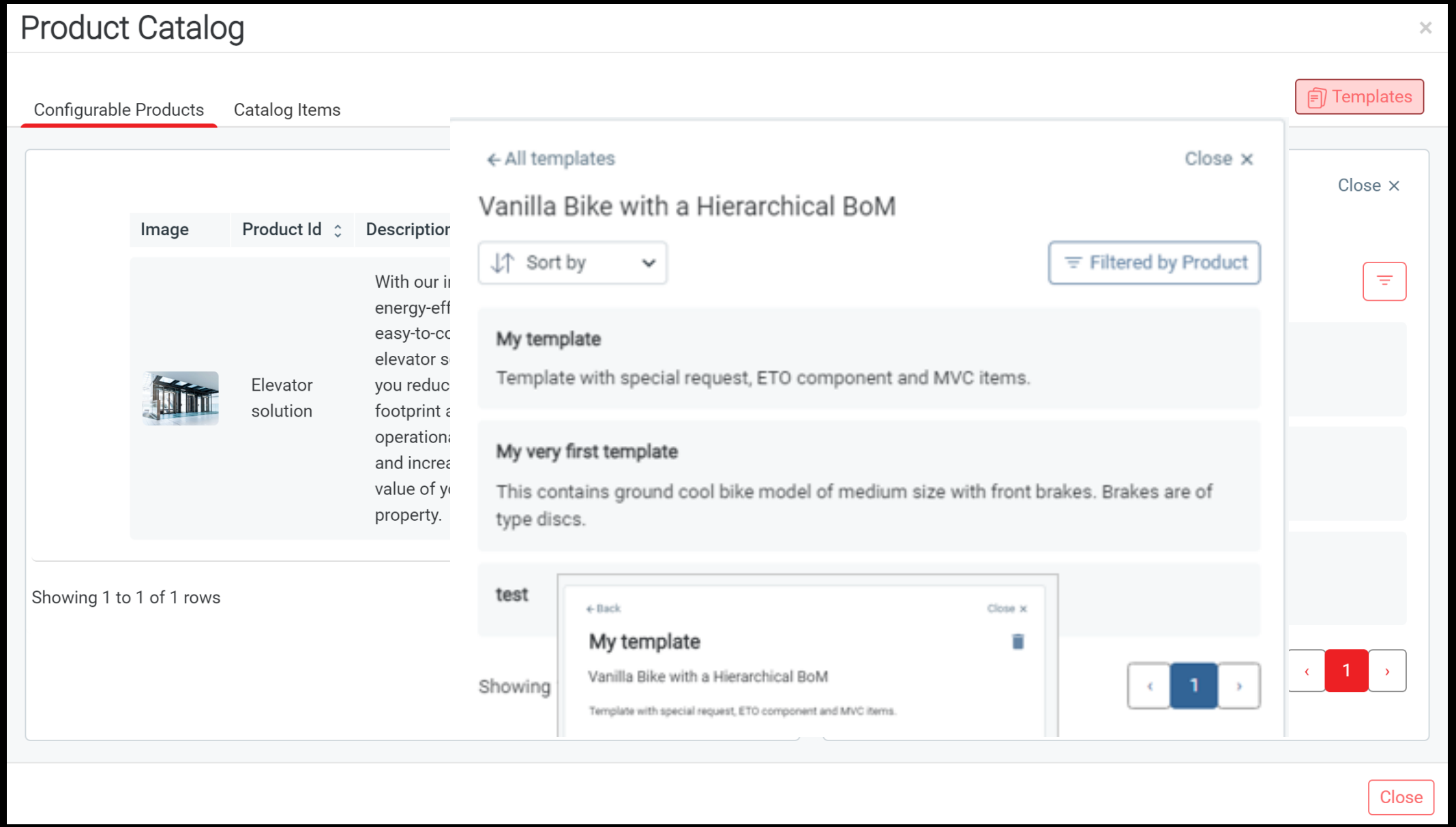
Customized/personalized starting point for the configuration

Ideal when selling to special customers with special needs

You can even prepare templates and share with others in the organization.

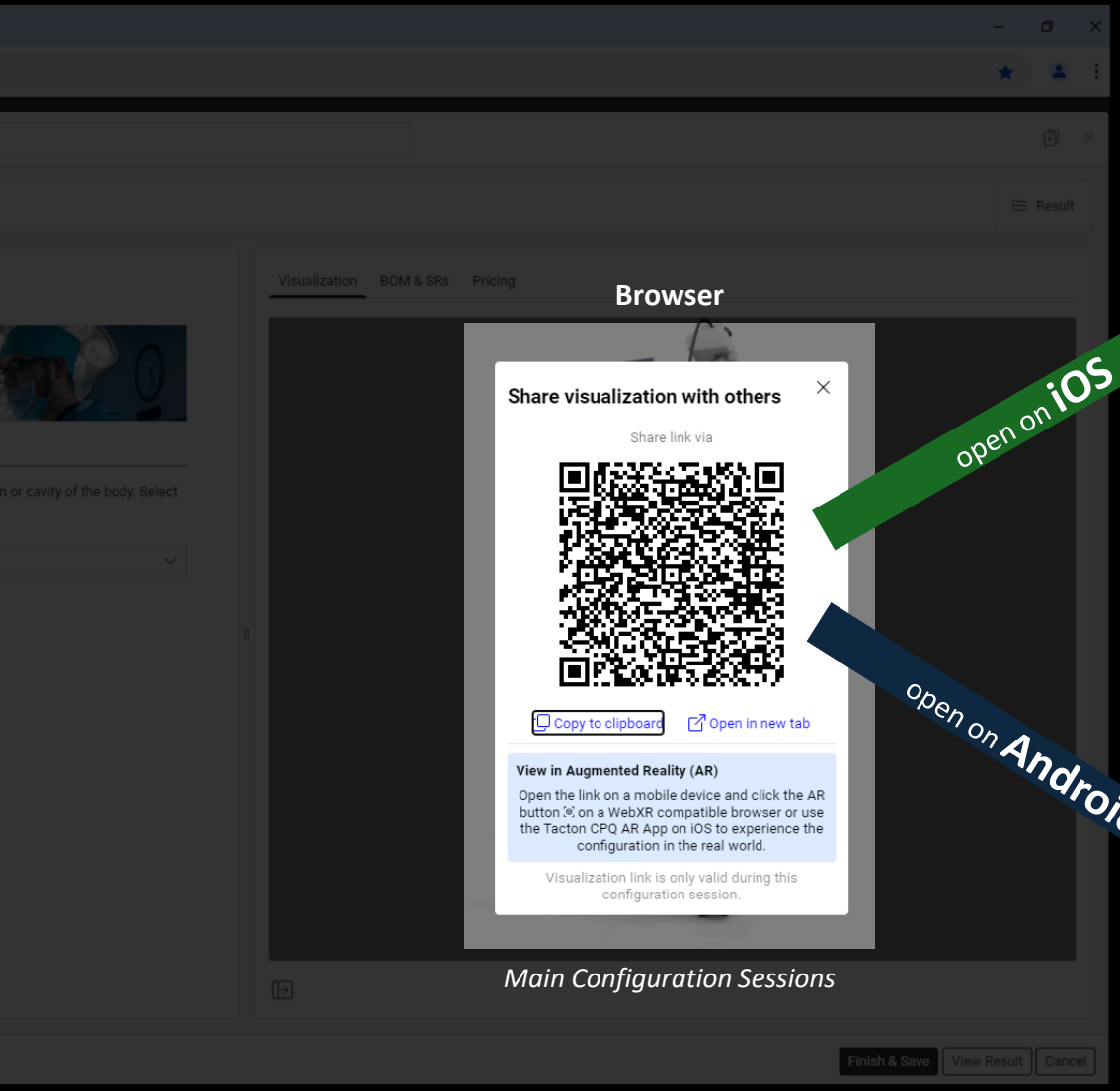


Templates


Product Catalog
Configurable Products
Catalog Items
Templates
Image
Product Id
Description
Elevator solution
With our i
energy-eff
easy-to-cc
elevator s
you reduc
footprint a
operationa
and increa
value of y
property.
Showing 1 to 1 of 1 rows
All templates
Close
Vanilla Bike with a Hierarchical BoM
Sort by
Filtered by Product
My template
Template with special request, ETO component and MVC items.
My very first template
This contains ground cool bike model of medium size with front brakes. Brakes are of type discs.
test
Back
Close
My template
Vanilla Bike with a Hierarchical BoM
Template with special request, ETO component and MVC items.
Showing
1
Close
1
Close

3D Viz and AR

Augmented Reality for Android



open on **iOS**

open on **Android**

Browser

Shared Configuration Session

start **AR**

(AR capable device)

Tacton CPQ AR App

Shared Configuration Session

Browser

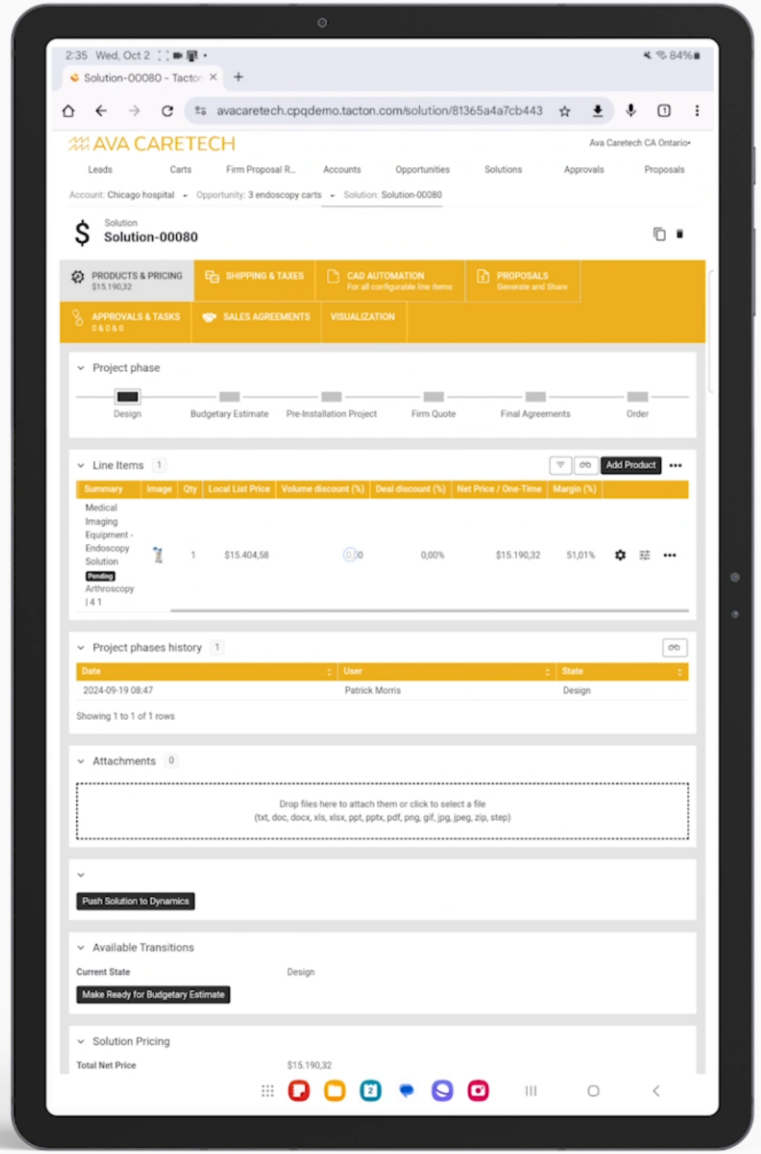
start **AR**

(AR capable device)

Browser
(with WebXR support)

Augmented Reality for Android

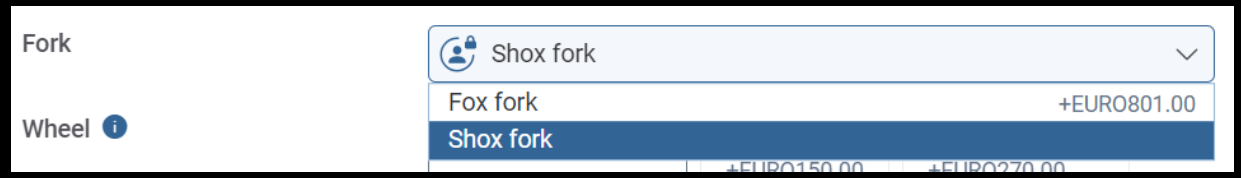
Video!



Delta Pricing

Improved support for displaying prices for options and accessories before they are selected, to support the sales rep when the customer asks ”How much is it?”.

Display as list or delta price using currect currency.



Delta Pricing

Engine Selection

12L Cummins X12 (2018) 380hp engine

15L Cummins X15 Performance Series (2017) 505hp engine	+$209
15L Cummins X15 Performance Series (2017) 485hp engine	-$750
15L Cummins X15 Efficiency Series (2017) 400hp engine	-$1,295
15L Cummins X15 Efficiency Series (2017) 450hp engine	-$1,297
15L Cummins X15 Efficiency Series (2017) 500hp engine	-$1,460
12L Cummins X12 (2018) 500hp engine	+$609
12L Cummins X12 (2018) 475hp engine	+$624
12L Cummins X12 (2018) 455hp engine	+$435
12L Cummins X12 (2018) 430hp engine	+$303
12L Cummins X12 (2018) 430hp engine	+$241
12L Cummins X12 (2018) 410hp engine	+$226
12L Cummins X12 (2018) 400hp engine	+$37
12L Cummins X12 (2018) 380hp engine	

Visualization

Pricing

BoM & SRs

$12,684

ZF - Ecosplit gearbox

$5,936

ZF - Ecomat for trucks gearbox

$5,741

ZF - AS Tronic mid gearbox

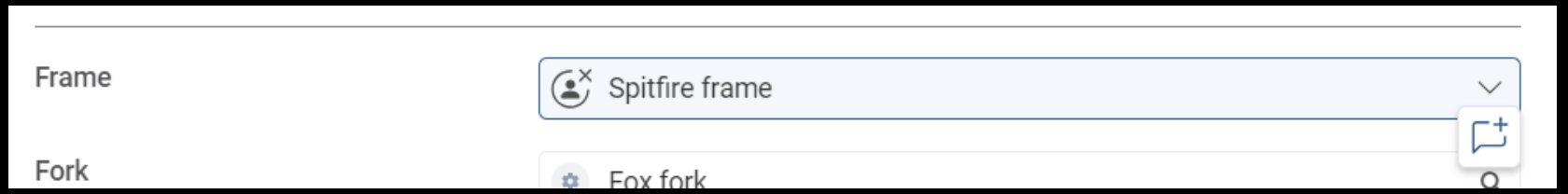
$5,707

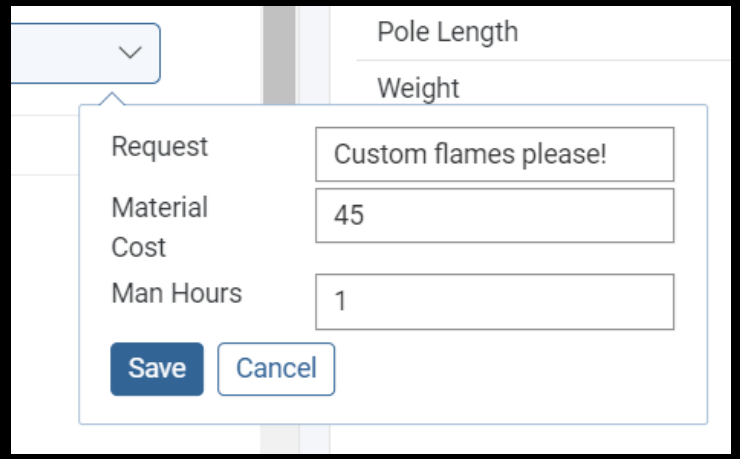
ZF - AS Tronic lite gearbox

Inline BOM Edits

Add notes and other information to selections during configuration to capture custom requests and more.

Makes it easier and faster for Sales Reps to add custom requests.





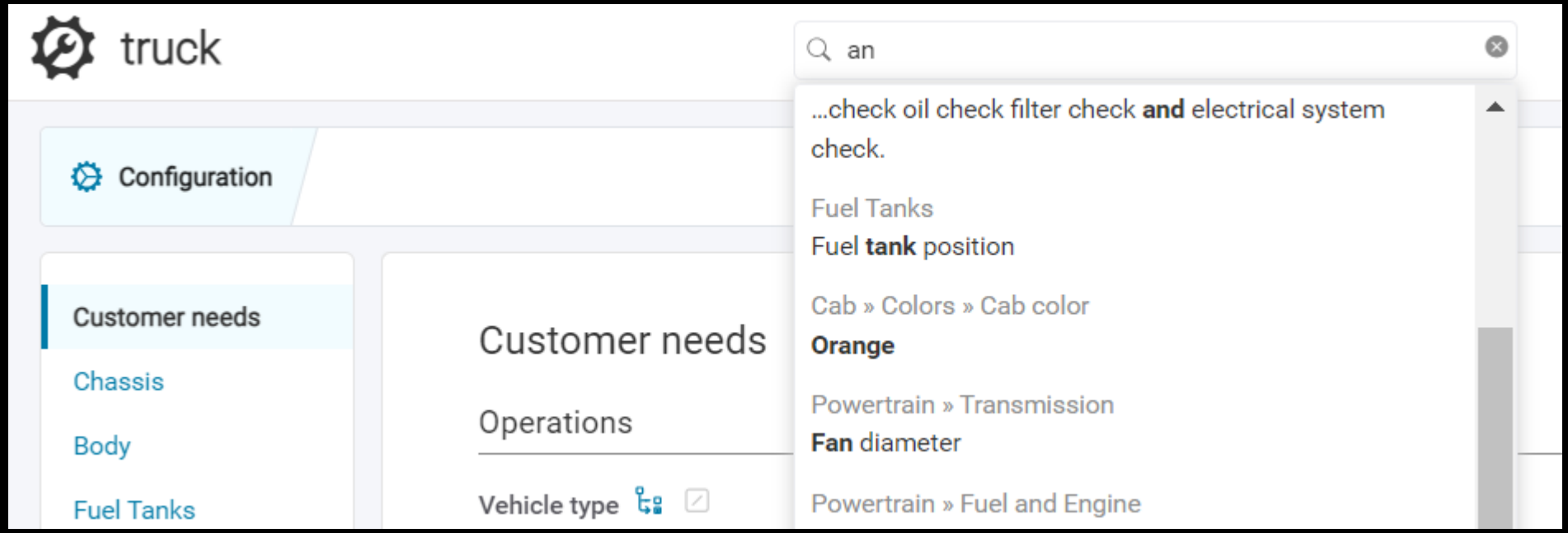
Find

Search and find questions, options, variants when needed.

Easily select option.

Find

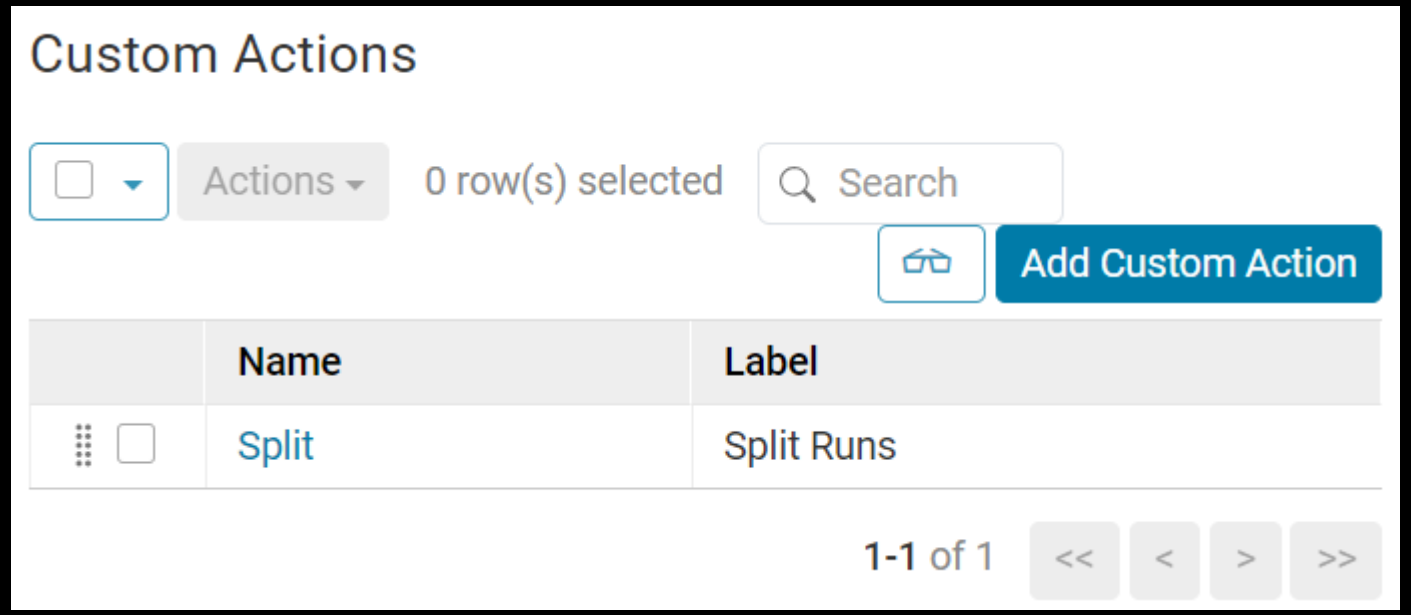
Search and find questions, options, variants when needed.
Easily select option.



Custom Actions

For the Related Objects Panel

Automate tasks with a script



Vehicle Change Orders

A quote of 10 identical vehicles creates 10 orders when closed. Need a way of handling change orders where some vehicles need a different configuration, sometimes referred to as Split Runs.

New custom actions on the related objects panel to support this process.

With this, Sales Reps can utilize the power of the configuration logic also for change orders.

Indexed Constraints

Constraints operating over multiple dynamic positions, for example: Nozzle[i].size = Seal[i].size

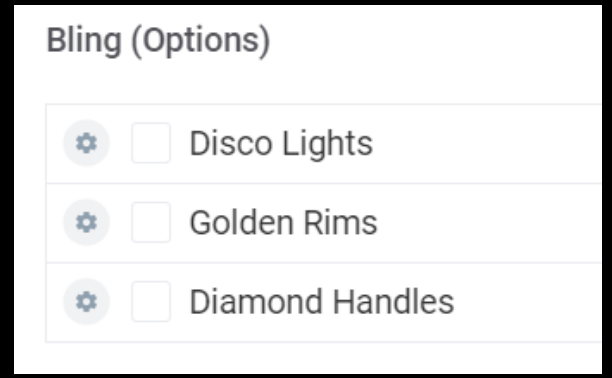
Makes it easier and more efficient for Modelers to model and maintain complex parts.

Options for Accessories

Native support for Options and Accessories, i.e. parts where SalesRep pick 0-1 or 0-n of each with a compact layout.

Makes it easier and faster for Sales Reps to select which options to include.

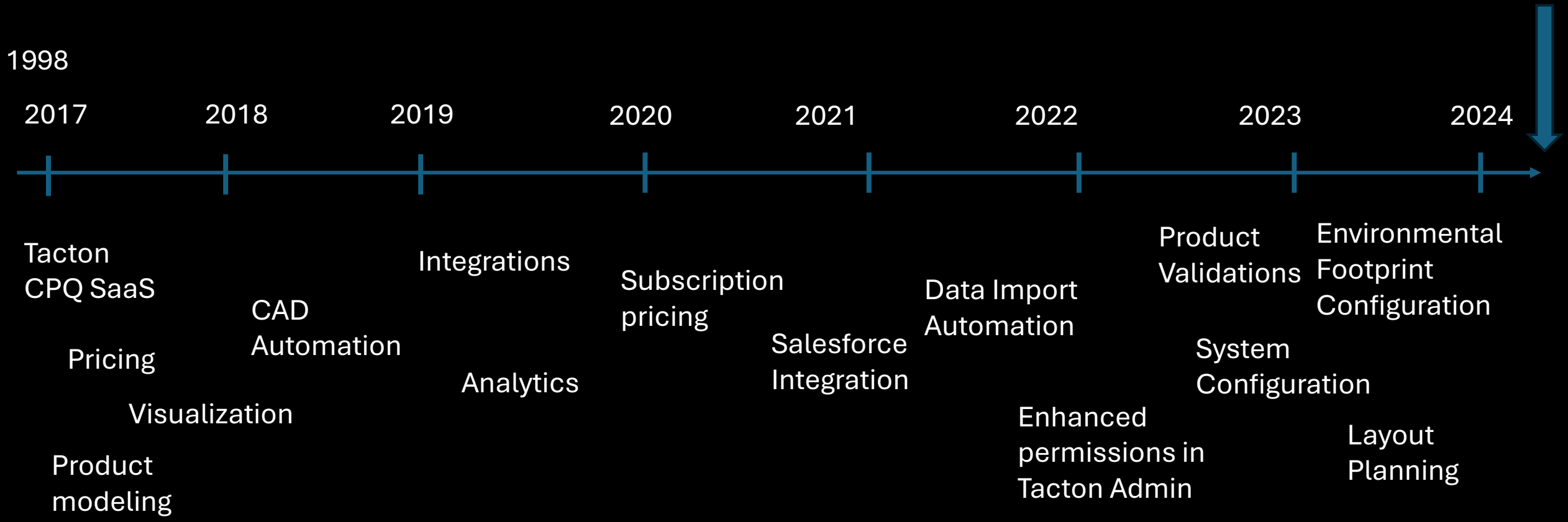
It is also easier and faster for modelers to build and maintain.



Tacton has a long history of innovation

Gartner Magic Quadrant for CPQ 2023:

- **Innovation:** Tacton CPQ is the most innovative product evaluated for this Magic Quadrant.



tacton

Tacton Integrations Powered by …

Mathias Roitto, Principal Solution Architect Tacton

Tacton Summit 2024

Who Am I?

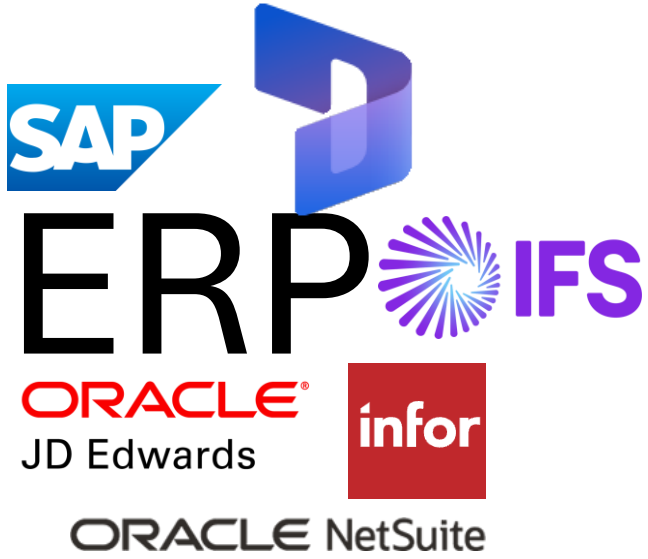
Mathias Roitto

Principal Solution Architect

Hockey player

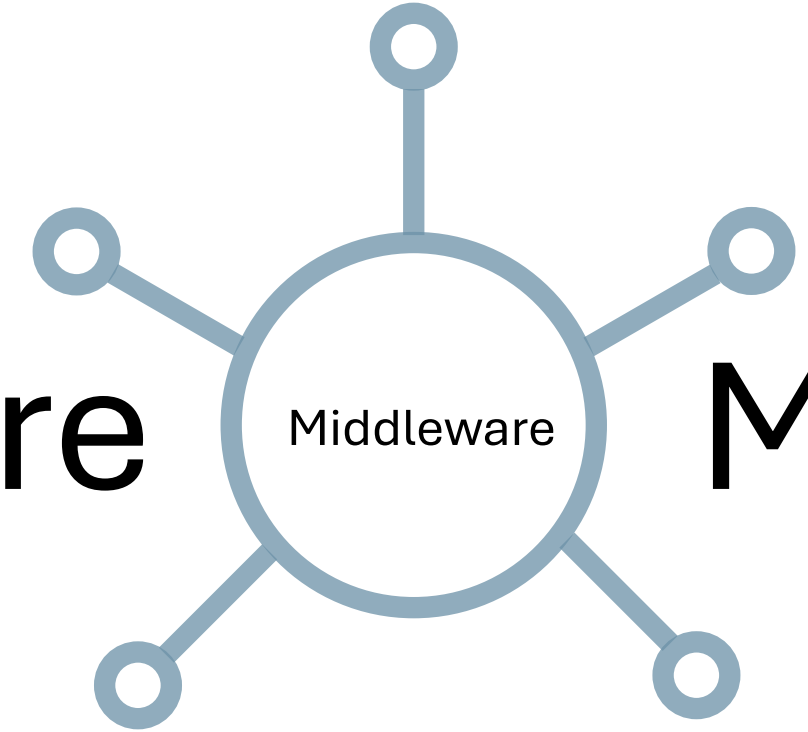
“Hockey is a metaphor for life. You have to be willing to get knocked down and get back up.” – Mike Eruzione

Your System Landscape



How to connect?

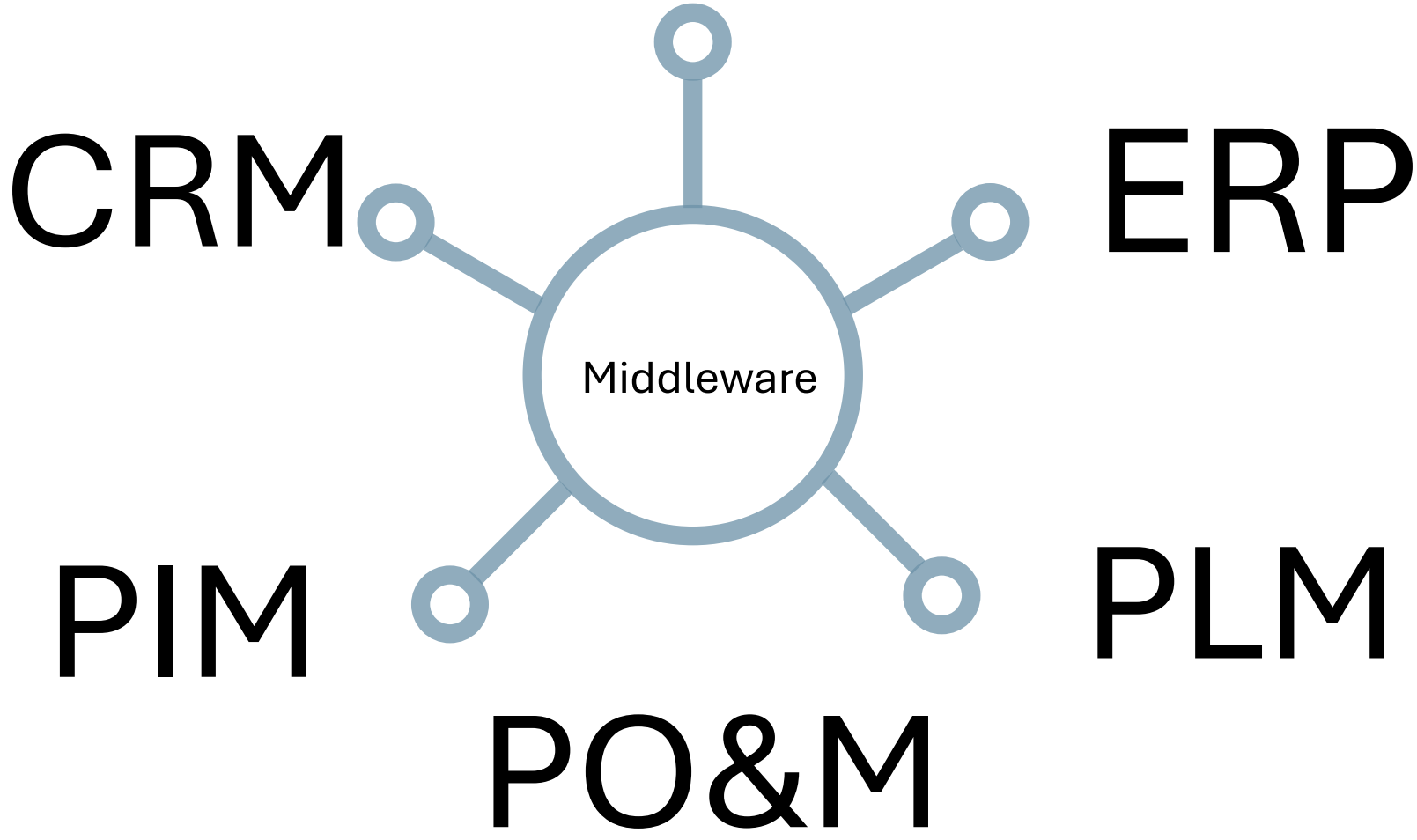
Middleware



Middleware

tacton

How to connect?



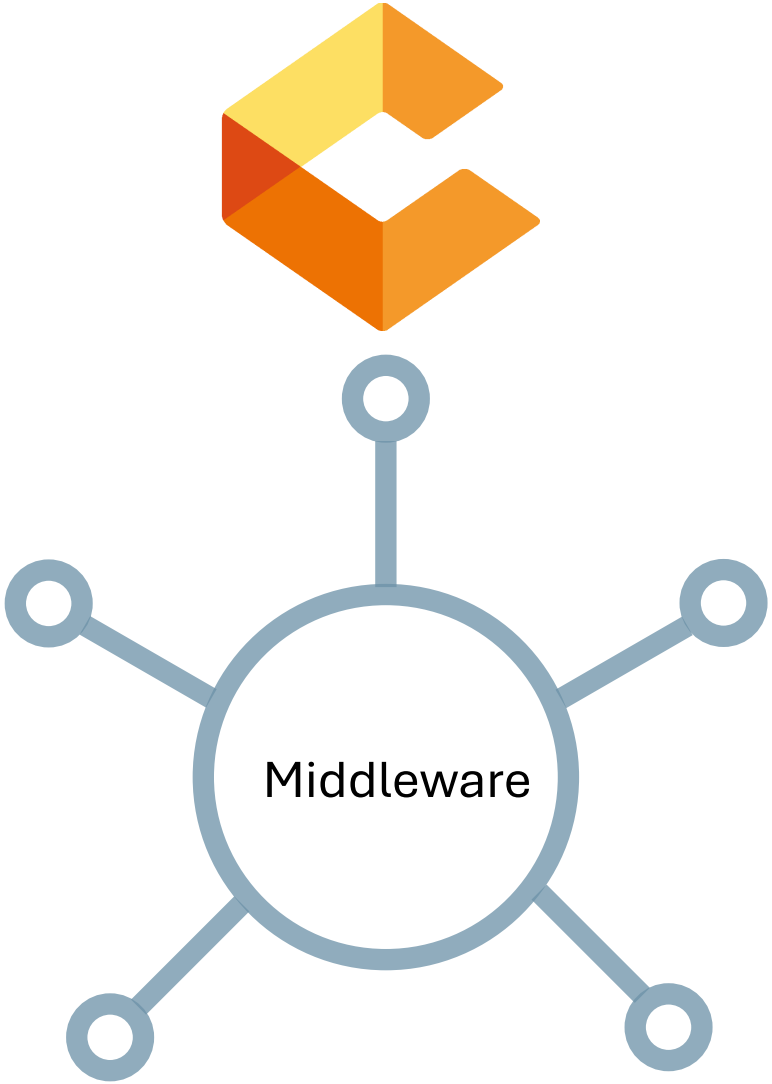
tacton

Middleware

Connector to each system

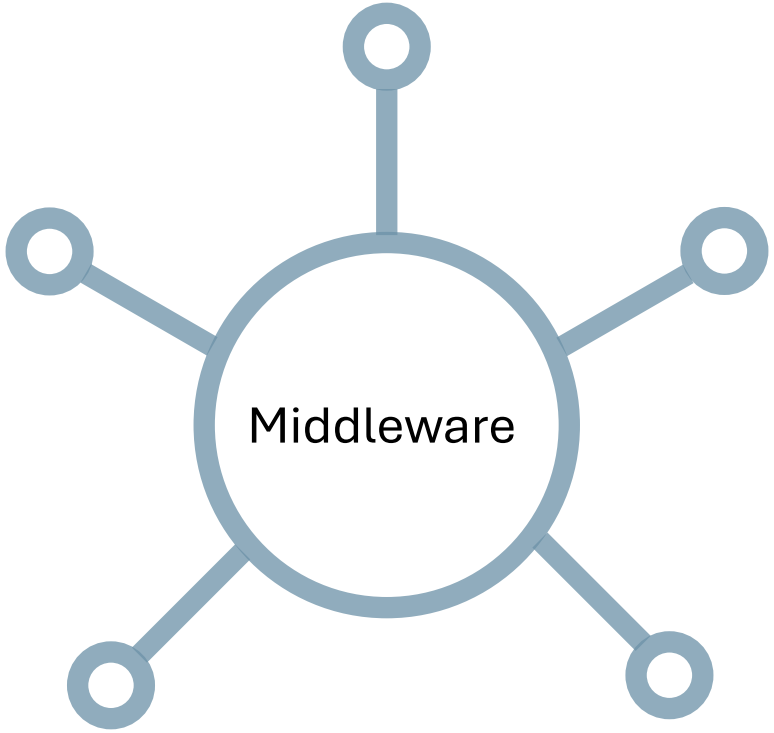
Orchestration of the integrations

Transforming data between formats



tacton

Middleware



workato

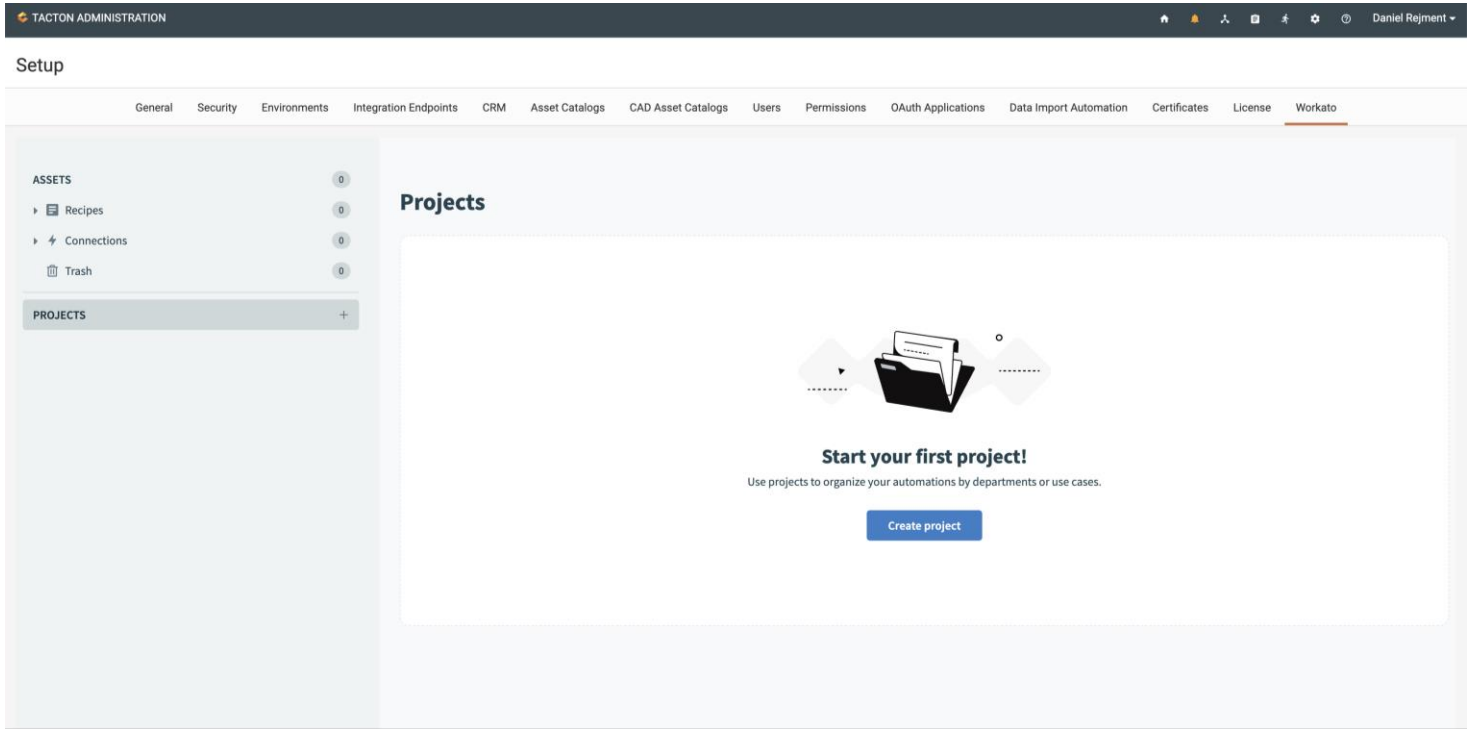
tacton

Why Workato?

Workato embedded in Tacton CPQ

tacton

Workato embedded in Tacton CPQ



Integrations with Tacton, Powered By Workato

tacton

MQ – CPQ and Middleware

Powered By Workato

No-code/Low-code platform:
Allows business users to create automated workflows without extensive programming knowledge.

Integration Hub:
Connects applications, databases, and services across various platforms (e.g., Salesforce, Slack, HubSpot).

Automation: Automates complex business processes such as onboarding, lead management, and data synchronization.

Pre-built Transformations: Offers thousands of pre-built "recipes" for common integrations, making automation faster and more efficient.

Scalable: Suitable for both small businesses and large enterprises.

Security & Compliance: Ensures data security through built-in compliance with enterprise standards.

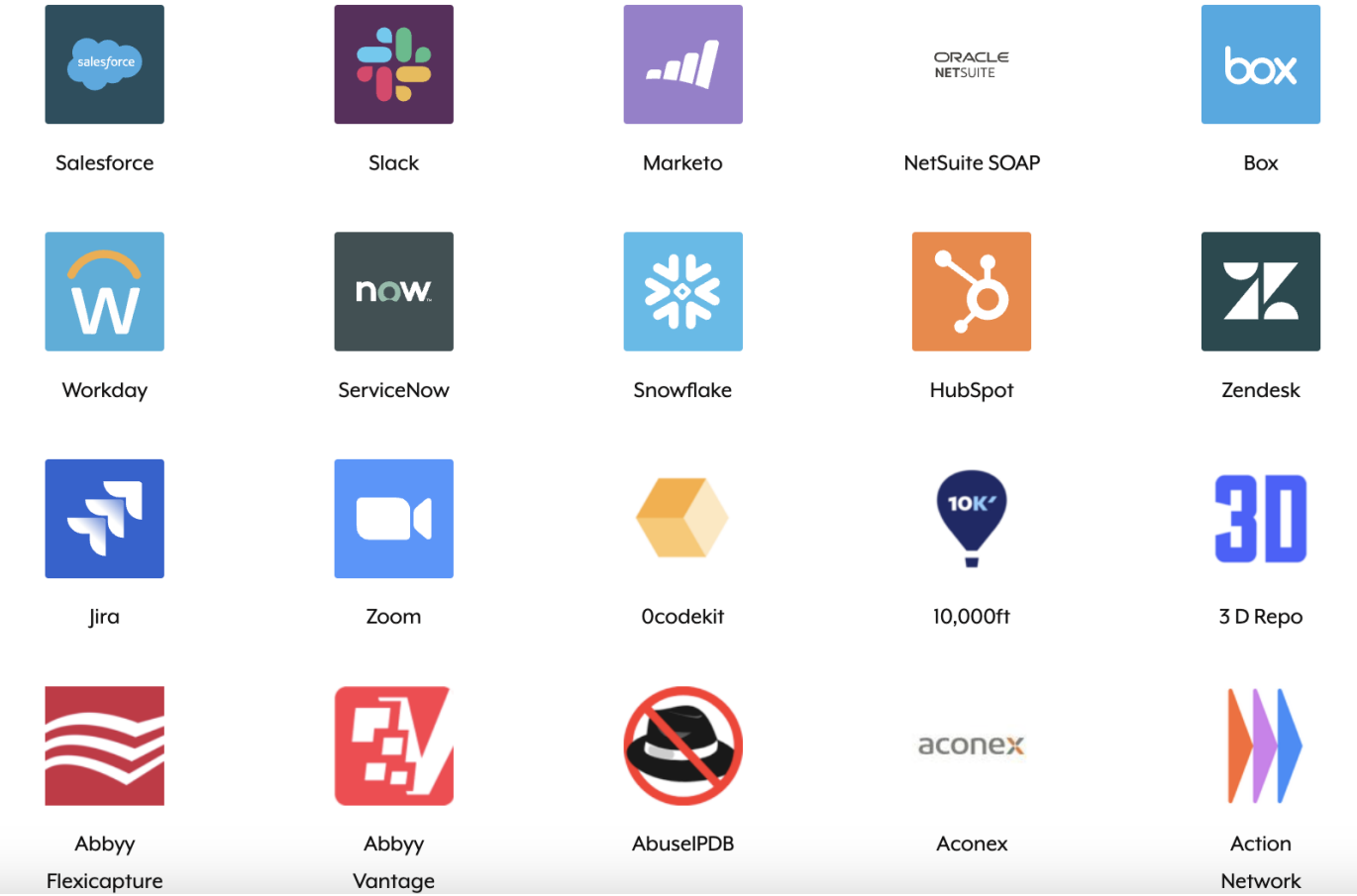
AI-powered Workflows: Leverages AI to enhance workflow automation and decision-making processes.

Connectors Powered By workato

tacton

Connectors Powered By workato

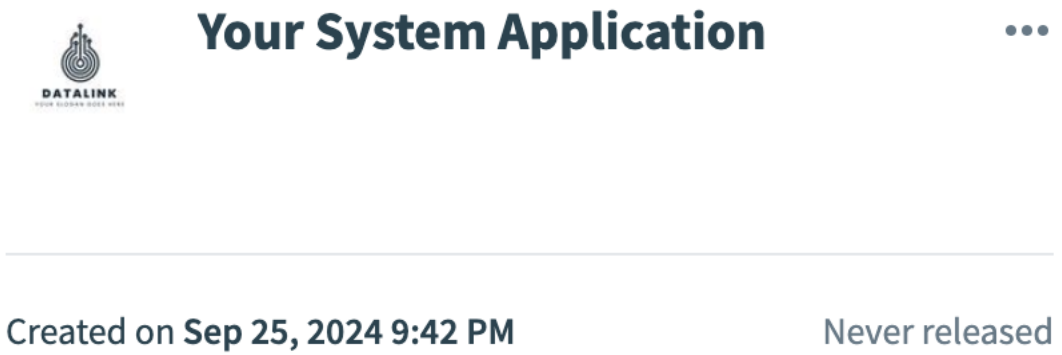
Use pre-built smart connectors to 600+ SaaS apps and databases



tacton

Connectors Powered By workato

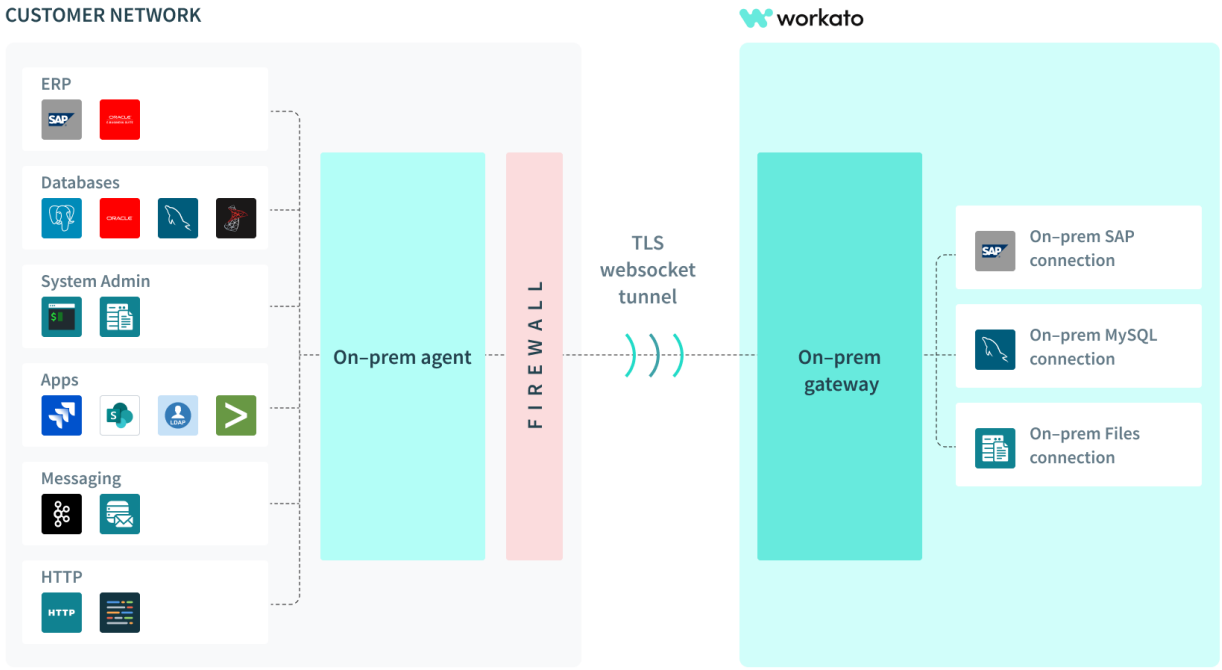
Build additional connections easily with Workato's Connector SDK



tacton

Connectors Powered By workato

On-prem agent provides a secure way for selectively access customer-authorized integrations to on-prem apps, databases, and folders without having to open ports in the corporate firewall.



tacton

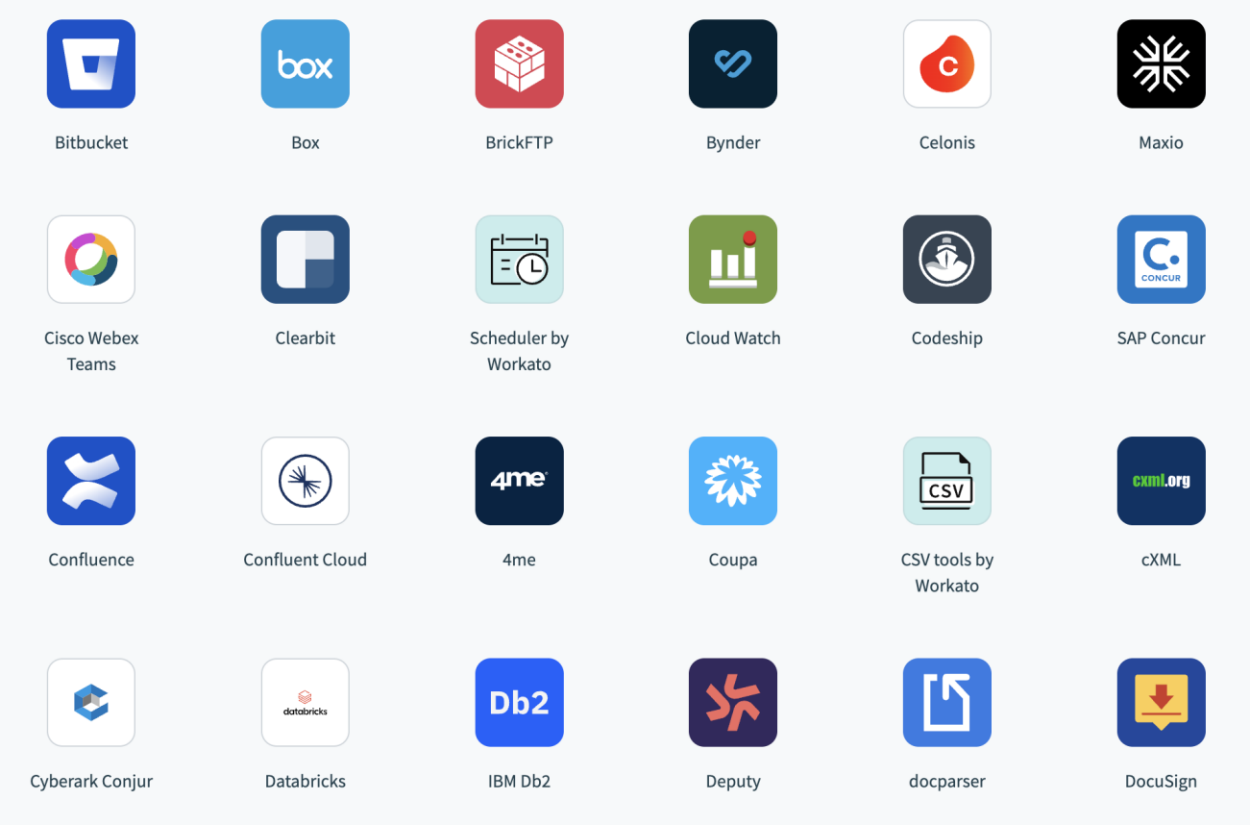
Recipes Powered By

workato

tacton

Recipes Powered By workato

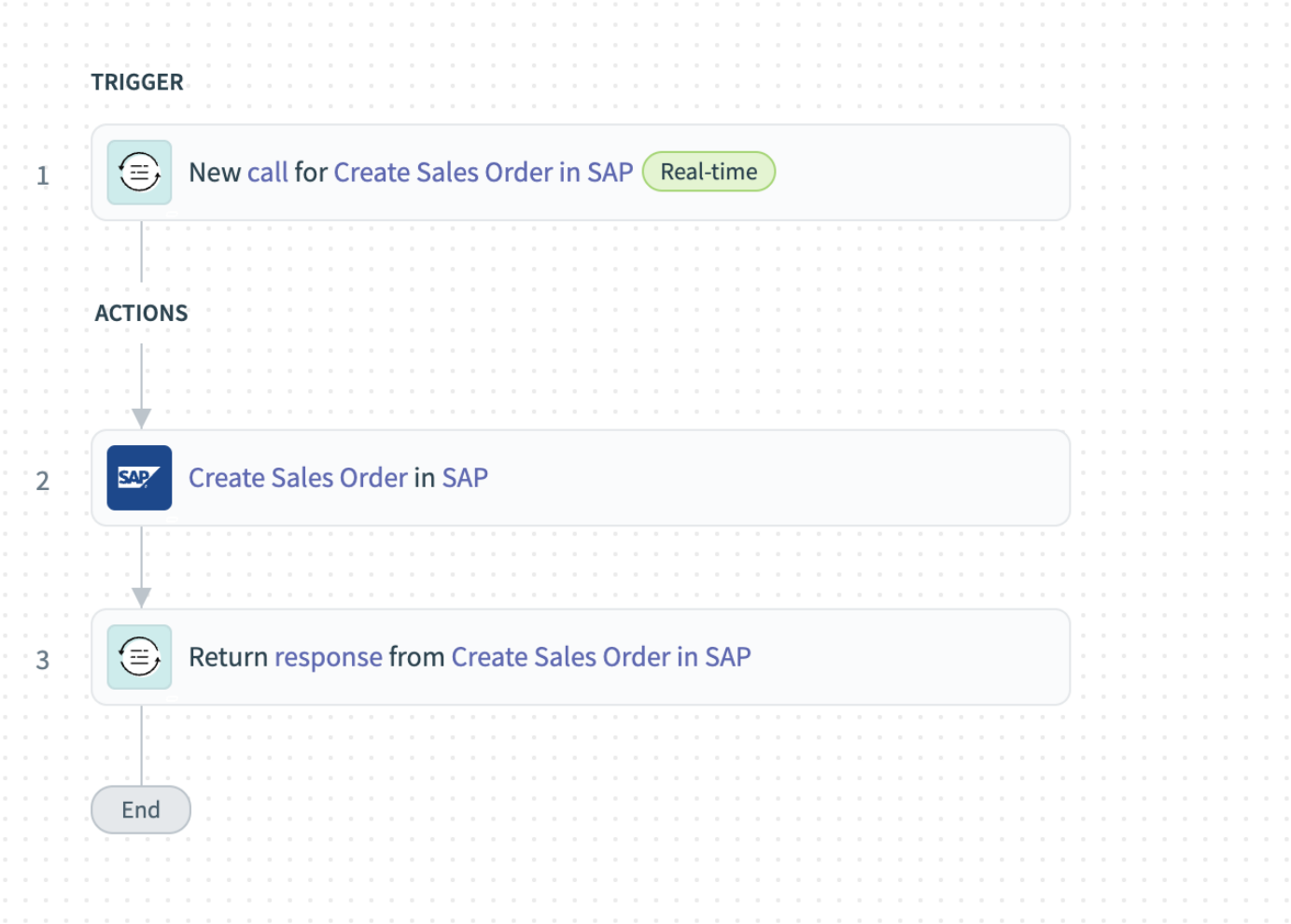
Many pre-built recipes in the library, ready to be used



tacton

Recipes Powered By workato

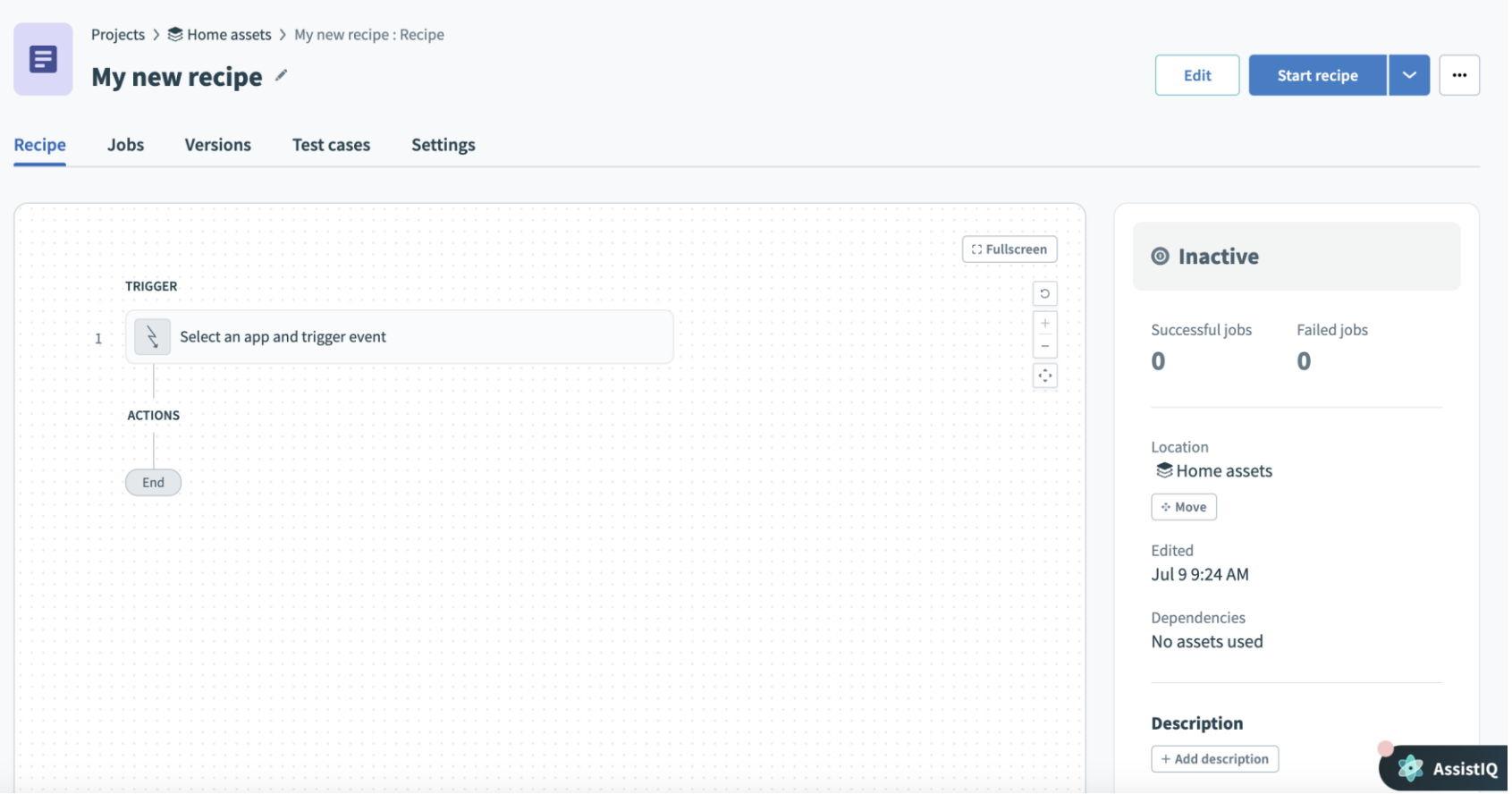
Many pre-built recipes in the library, ready to be used



tacton

Recipes Powered By workato

Create your own, reusable recipe



tacton

Why embed?

workato

No need to rely on you IT department to free up resources to build your integrations.

Connect using existing connectors or build additional connections easily with the Connector SDK

Tacton Integration Powered by Workato will give you a great starting point, all in one contract with Tacton.

Manage, monitor and deploy, all from within Tacton CPQ administration

tacton

Implementation

workato

TACTON

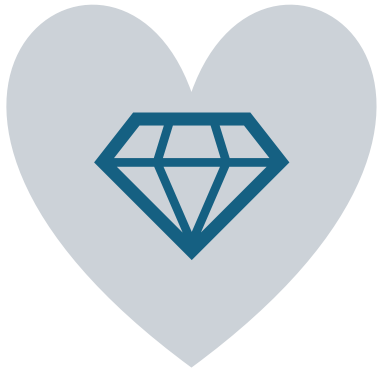
TACTON PARTNER

YOU

tacton

Value

workato



BRINGING VALUE EARLIER IN THE PROCESS

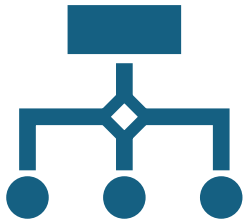
INTEGRATIONS ALREADY IN PHASE 1

INTEGRATED ORDER ENTRY WILL ALLOW YOU TO INVOICE YOUR CUSTOMERS ALREADY FROM THE FIRST RELEASE OF TACTON CPQ

tacton

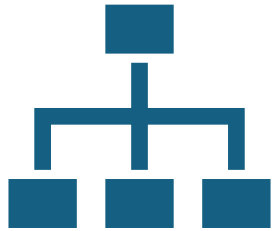
Enterprise readiness

workato

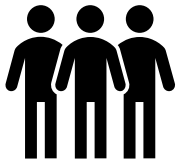


All connectors and recipes can be transferred to a stand-alone Workato in the future

You are not locked in using Tacton CPQ as your middleware for your Enterprise solutions



Your team can take over the solution, the same way as Tacton CPQ administration.



tacton

Let’s get connected with Tacton Powered by Workato

tacton

Questions

tacton

Lunch break until 13:45

Tacton Summit 2024

tacton

Guided Selling

Johan Jacobsson, VP Industrial Advisory Tacton

Tacton Summit 2024

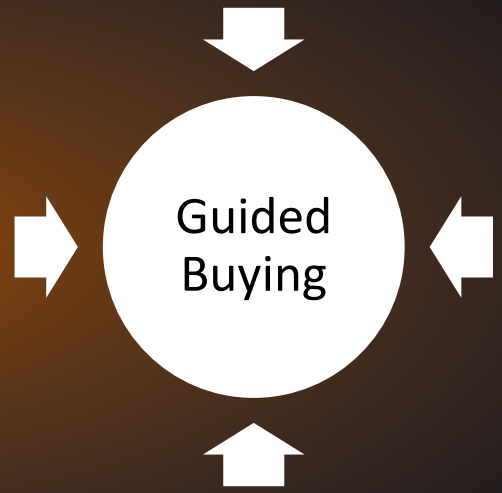
tacton

Guided Buying

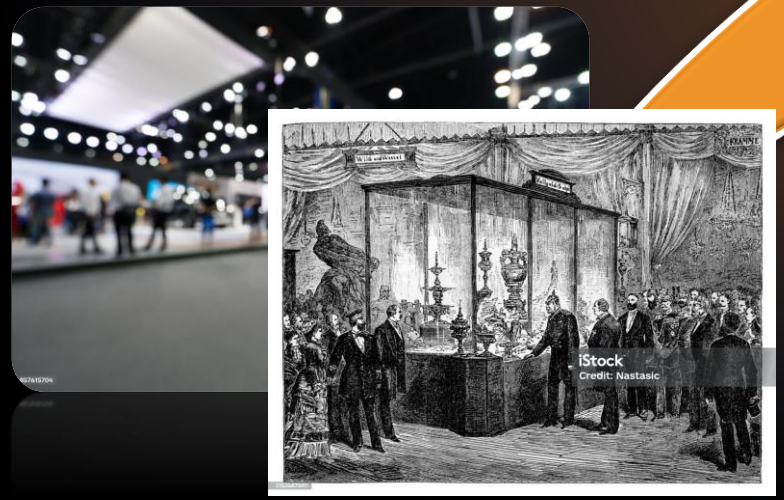
Johan Jacobsson, VP Industrial Advisory Tacton

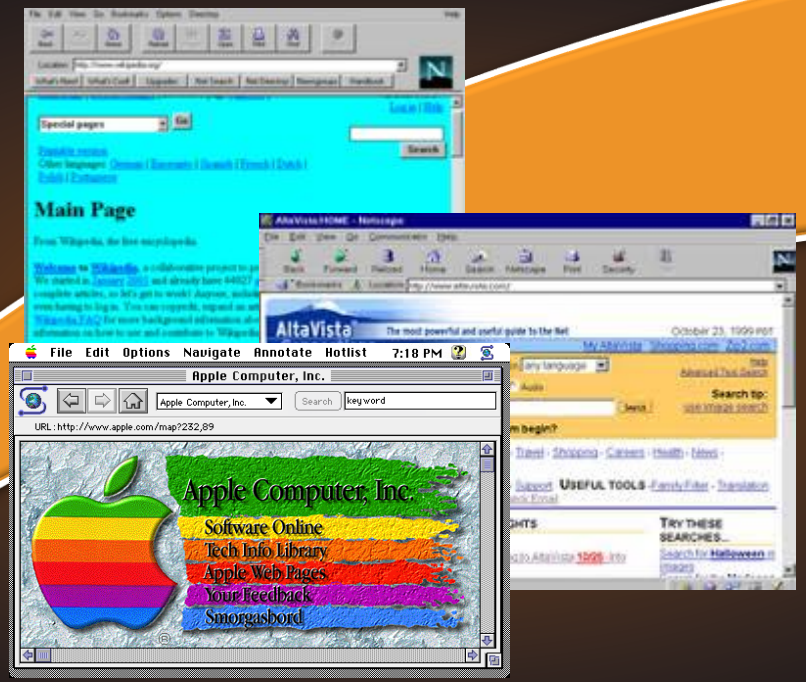
Tacton Summit 2024

Guided
Selling

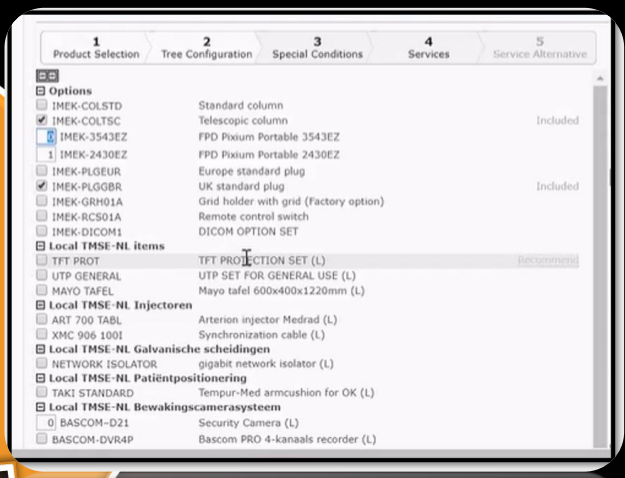

Guided
Buying

Trade Fairs / Industry Magazine

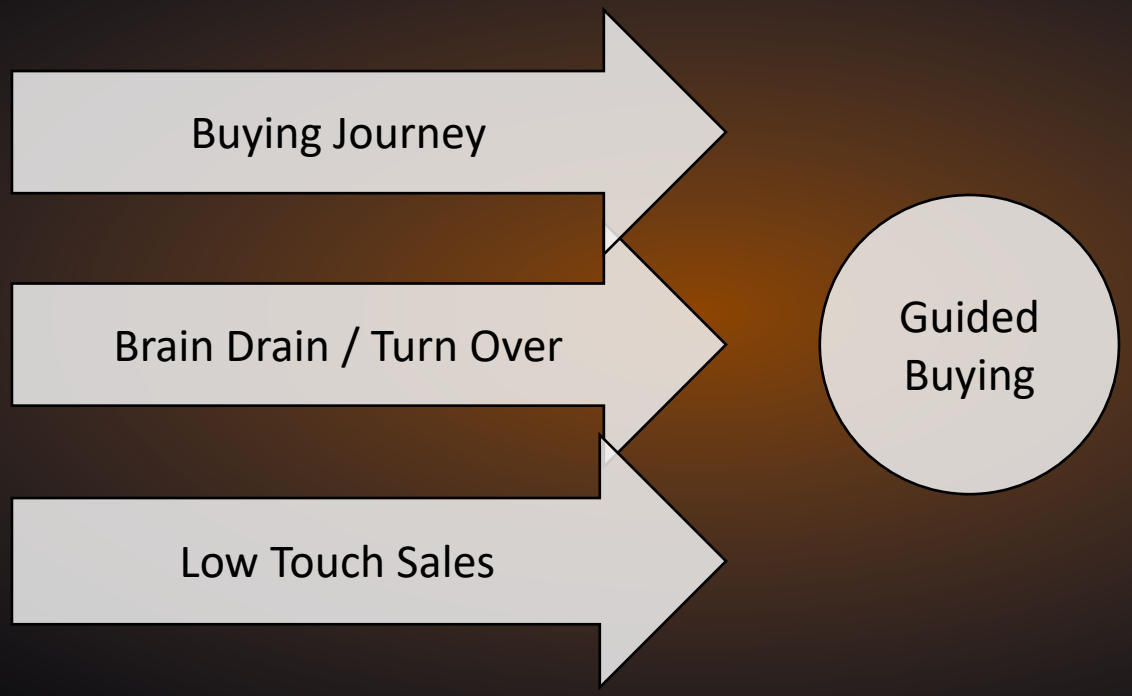




Internet



Legacy CPQ


Buying Journey
Brain Drain / Turn Over
Low Touch Sales
Guided Buying

Benefits

- Support the buying journey earlier
- Educate your customers
- Build trust
- Improved Customer Satisfaction
- Reduced Sales Cycles
- Ramp up your sales reps to productivity faster or enable low touch sales
- Study potential customers’ behaviour

What is stopping organizations?

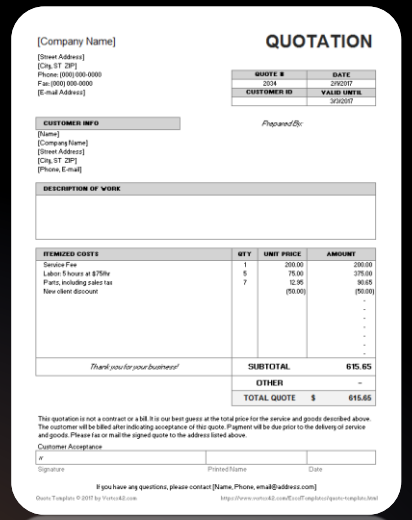
- We do not have time for this now – we will add it later
- Our sale is too technical, or too many parameters must be defined – or it requires a site visit – or…
- We want to maintain a tight relationship with our customer
- Systems Performance – its ok for direct sales but not for self-service. We can not expose current systems online.

Self Service

Buying Journey

Past interaction point

New interaction point


[Company Name]

QUOTATION

[Street Address]
[City, ST ZIP]
Phone: (000) 000-0000
Fax: (000) 000-0000
[E-mail Address]

QUOTE #	DATE
2014	2/6/2017
CUSTOMER ID	VALID UNTIL
	3/3/2017

CUSTOMER INFO

[Name]
[Company Name]
[Street Address]
[City, ST ZIP]
[Phone, E-mail]

Prepared By:

DESCRIPTION OF WORK

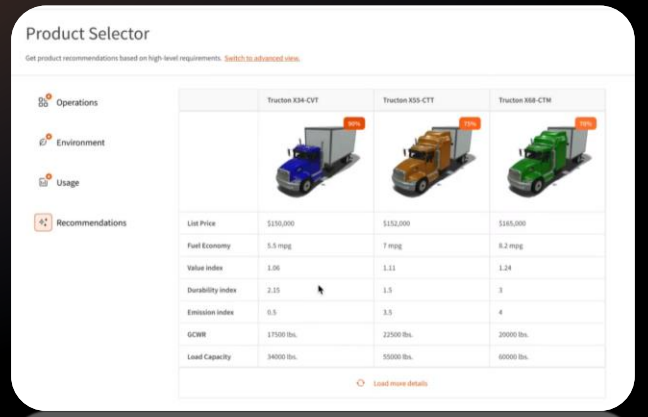
ITEMIZED COSTS	QTY	UNIT PRICE	AMOUNT
Service Fee	1	200.00	200.00
Labor: 5 hours at $75/hr	5	75.00	375.00
Parts, including sales tax	7	12.95	90.65
New client discount		(50.00)	(50.00)
			-
			-
			-
			-
			-
			-
Thank you for your business!		SUBTOTAL	615.65
		OTHER	-
		TOTAL QUOTE $	615.65

This quotation is not a contract or a bill. It is our best guess at the total price for the service and goods described above. The customer will be billed after indicating acceptance of this quote. Payment will be due prior to the delivery of service and goods. Please fax or mail the signed quote to the address listed above.

Customer Acceptance

X		
Signature	Printed Name	Date

If you have any questions, please contact [Name, Phone, email@address.com]



Your product

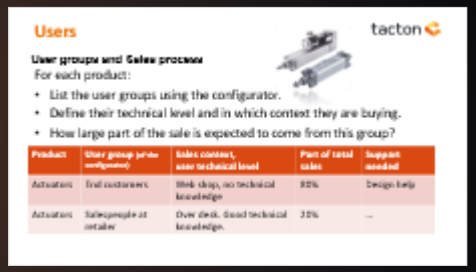
Your Customer

Understand the users of the CPQ system?

Define the questions

Add Supporting Elements / Technologies

Link questions to your configuration model



- Meet your customers in their buying process
- Win rate improvements
- Number of Quotes increases

- Shorter Sales cycles
- Increased Customer Satisfaction

- Ramp up your sales reps to productivity faster
- Enable rep-free sales for complex products – low touch sales
- Learn about your customers

Guided
Buying

tacton

Ominchannel Sales

Per Rohdin, Senior Product Marketing Manager Tacton

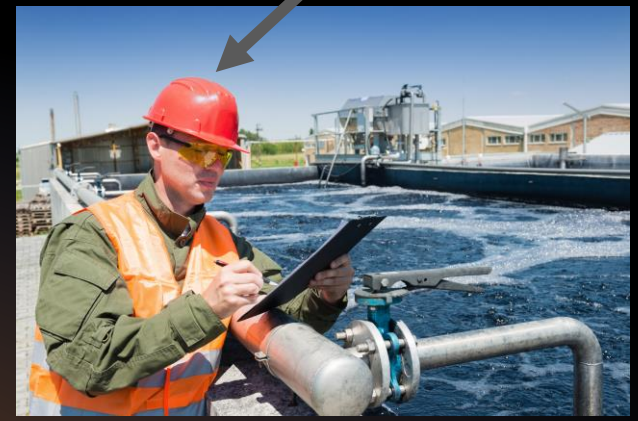
Tacton Summit 2024

Sales channels - Pros and cons

Digital Native

Pump Manufacturer

Pump distributor & system integrator



End customer – Water Treatment facility manager

Direct Sales

\+
- You own the customer relationship
- Expert sales

−
- High cost of sales
- Low market reach
- Ramp ups
- Sales rep attrition

Partner Sales

\+
- Lower cost of sales
- Larger market reach
- Local presence

−
- Less skilled sales reps
- Selling competitor brands
- Quote and order errors
- Customer relationship owned by partner

Customer Self-service

\+
- Convenience for end customer
- Reduced cost of sales and CAC
- ¨lobal reach – always available
- Revenue growth
- You own the customer relationship

−
- Requires efforts from customer
- Buying the right thing?
- Too complex?

The challenge for B2B Manufacturers

- How to bring the power of Configure-Price-Quote to all sales channels
- How to make B2B buying so smooth, transparent and convenient that even end customers themselves can define their solutions

Direct Sales	Partner Sales	Customer Self Service
	Reseller Distributors Dealers System Integrators OEMs	Digital Commerce eCommerce Customer Portals

Your highly customizable B2B Manufacturing products

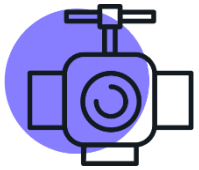
MACHINERY

PRODUCTION LINES

POWER GENERATION

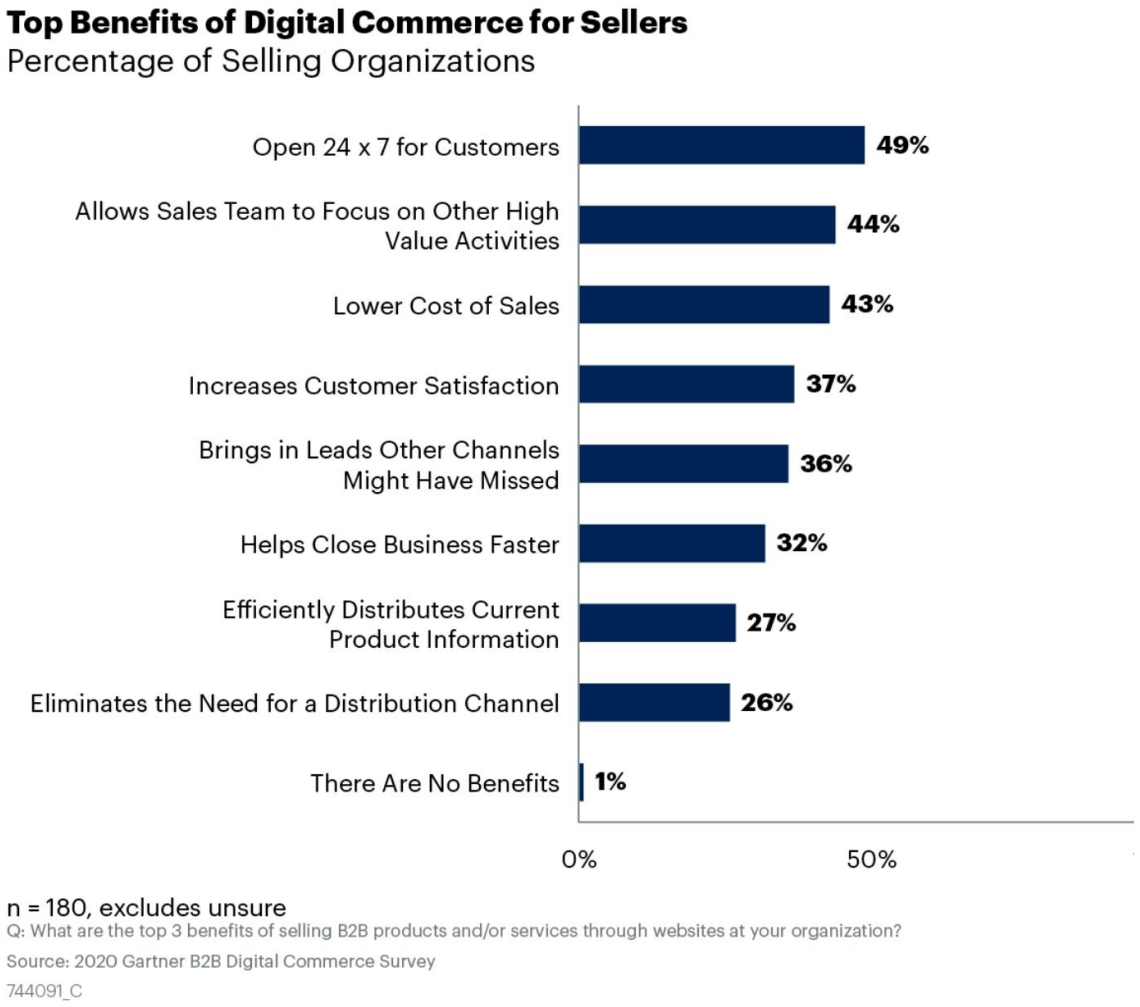
MEDTECH EQUIPMENT

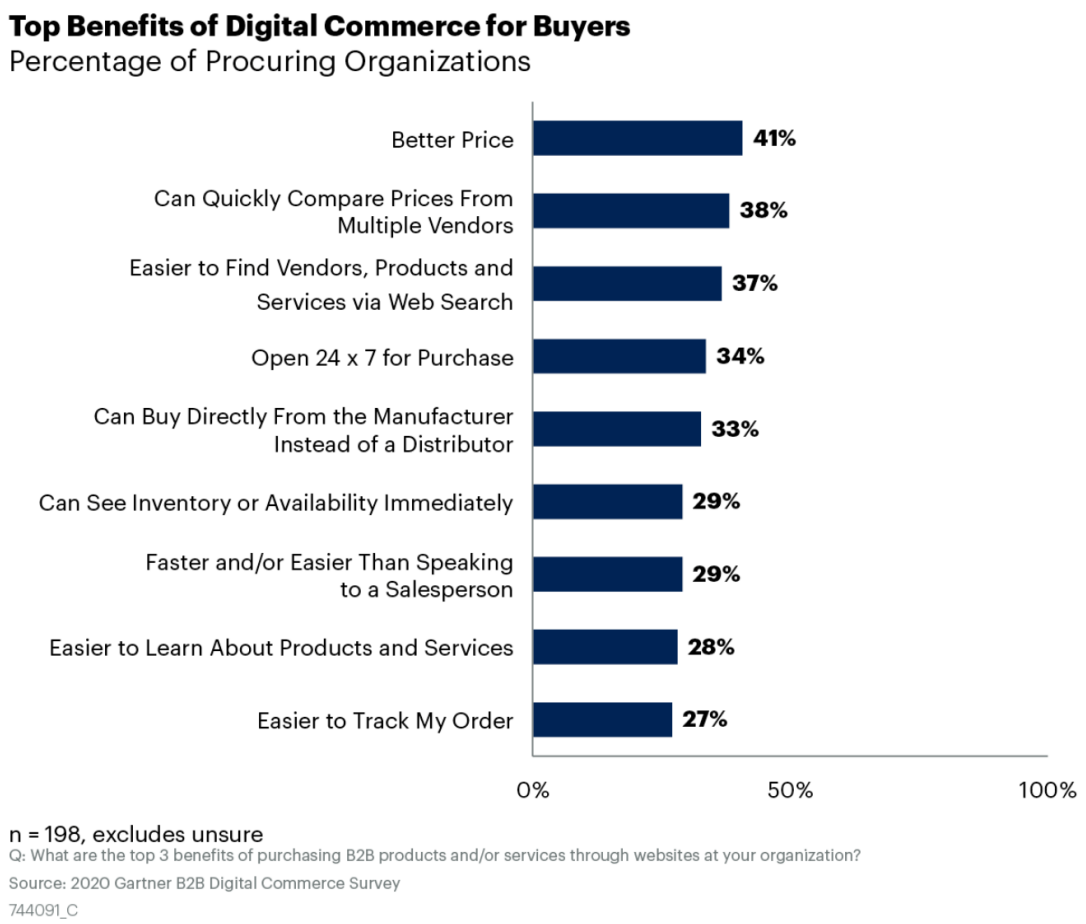
HEAVY VEHICLES & EQUIPMENT


PROCESSING & CONTROL OF FLUID & GAS

VERTICAL TRANSPORTATION SYSTEMS

The benefits of self-service is clear





Gartner

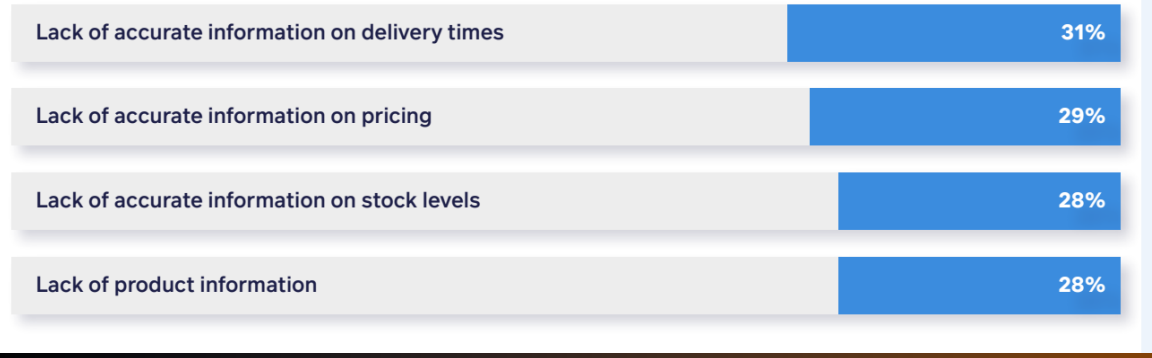
Addressing the expectations of digitally native buyers

Gartner: *Increase Profits and Delight Buyers by Becoming a Digital-First, Omnichannel B2B Seller*

Challenges

Why is B2B digital commerce not booming?

When asked what their main hurdles are to online purchasing, B2B buyers said:

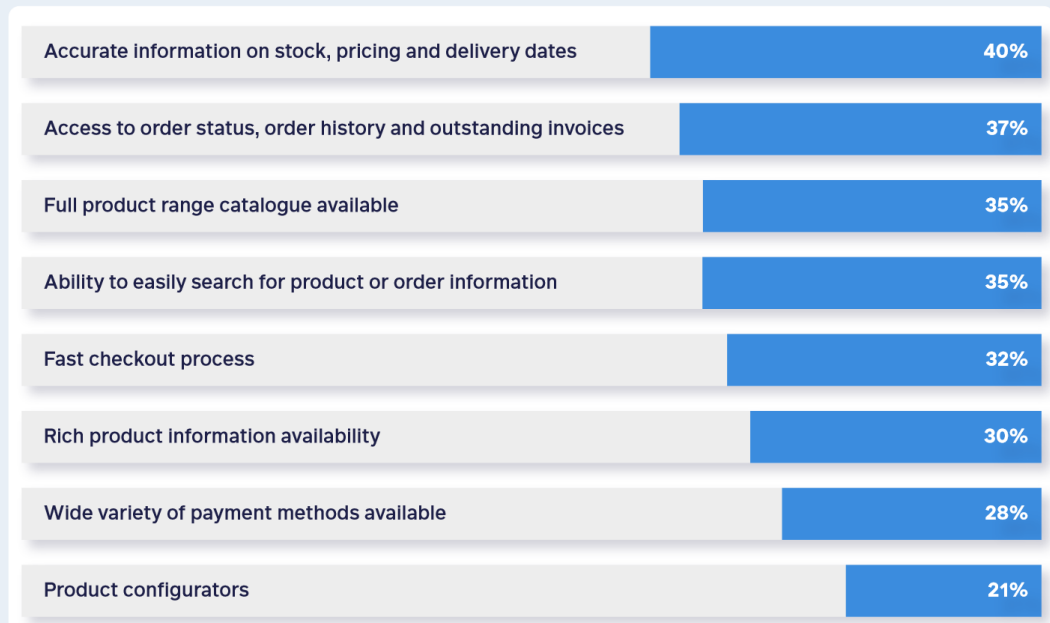


68% of B2B buyers report being put off from ordering online due to order errors.

These challenges increase with more complex products and solutions

Trust and reliability

In the responses to the survey, B2B buyers reiterated their preference for transparency and more information overall, saying their preferences are:



When it comes to solving issues like low web store adoption, it's not a question about whether or not customers want online buying. The research shows they unequivocally do. It's the quality of what you can provide in your web store that makes the real difference in determining if they will adopt it.

Sana Commerce: *B2B Buyer Report 2024: The Challenge of Web Store Adoption*

Dilemma: CPQ or Digital Commerce platform?

CPQ

- \+ Support for complex products
- − Assisted channels mostly

Digital Commerce Platforms

- \+ Self-service channels
- − No support for selling complex products

Direct Sales

Partner Sales

Reseller
Distributors
Dealers
System Integrators
OEMs

Self Service

Digital Commerce
eCommerce
Customer Portals

Tacton CPQ Omnichannel

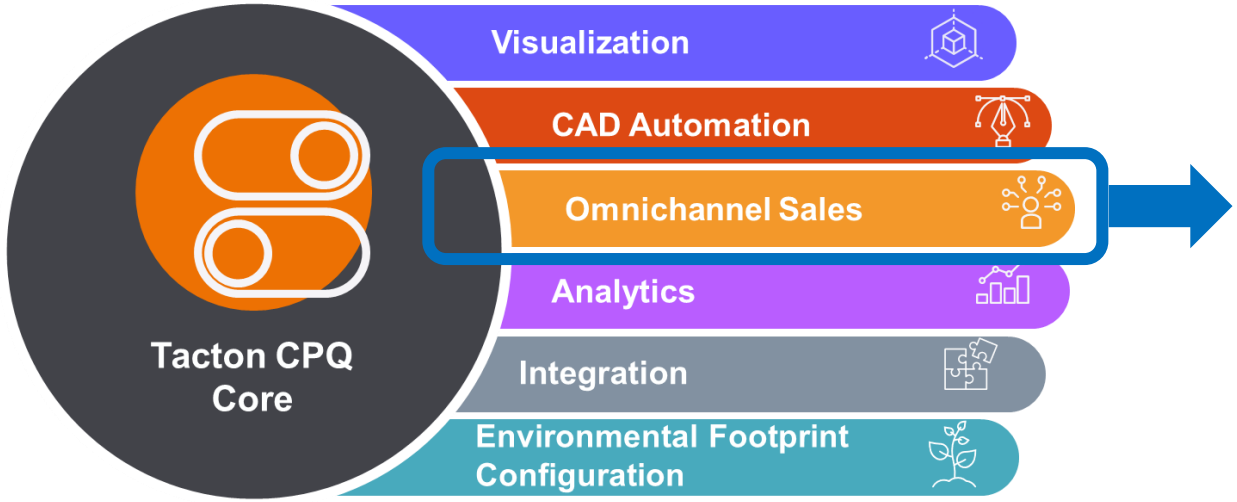
Direct Sales

Partner Sales

Reseller
Distributors
Dealers
System Integrators
OEMs

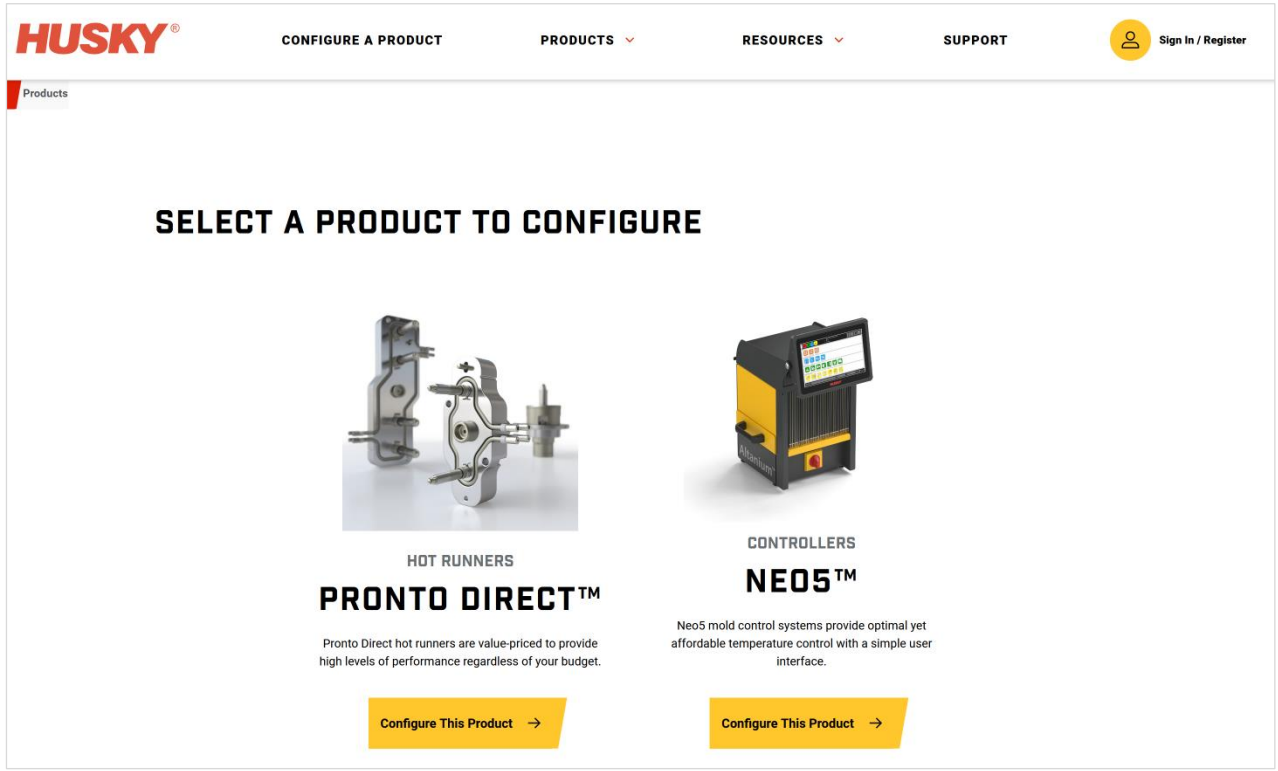
Self Service

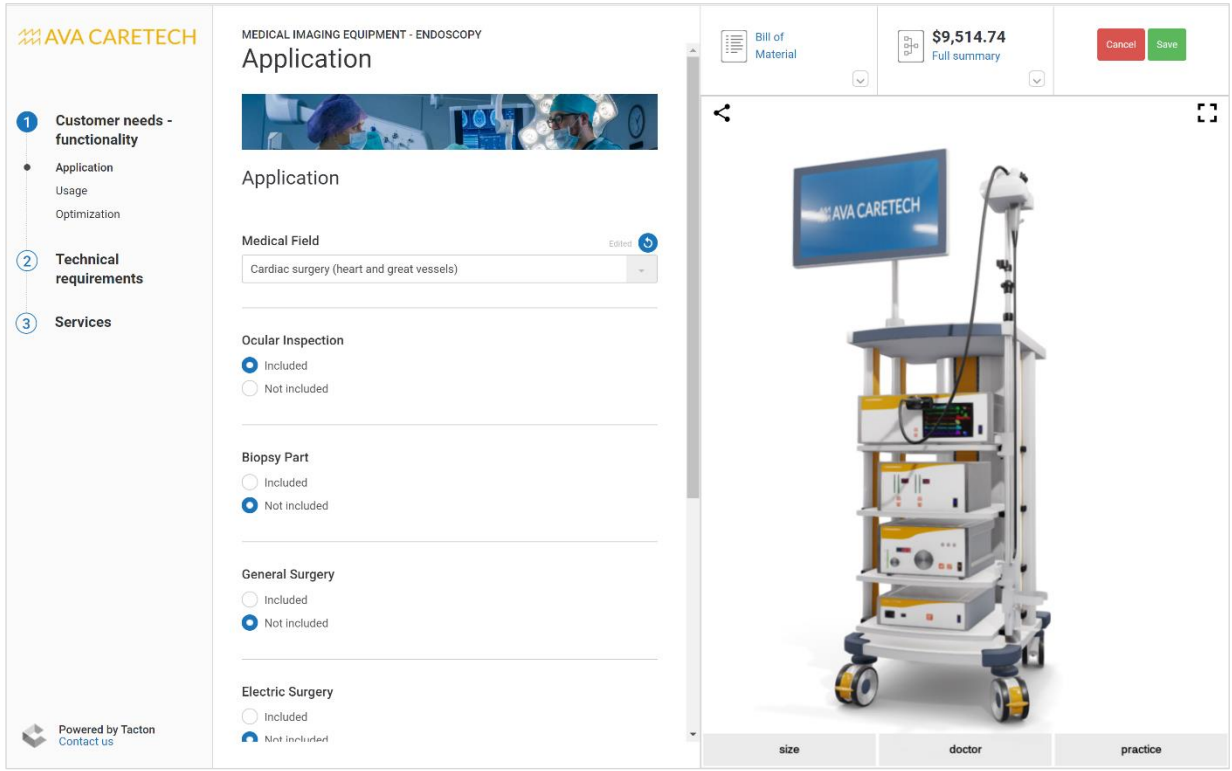
Digital Commerce
eCommerce
Customer Portals



Bring the power of CPQ to your **sales partners** and **end customers**

Embed your CPQ anywhere and anyhow





- Your website
- Customer/Partner Portals
- eCommerce platforms

- Rich and agnostic APIs

Making configuration easy – even for non-technical buyers

Advanced product variance – showcase, price and quote full portfolio

Solution selling (products + services) Mixed price types

Configurator validates all product logic - after every user selection – always a valid product

Guided selling – easy to understand questions, also for non-tech users

Automatic Market Compliance

Conflict resolution - Impossible to make mistakes

Mandatory fields

Tailor product configuration based on previous purchases

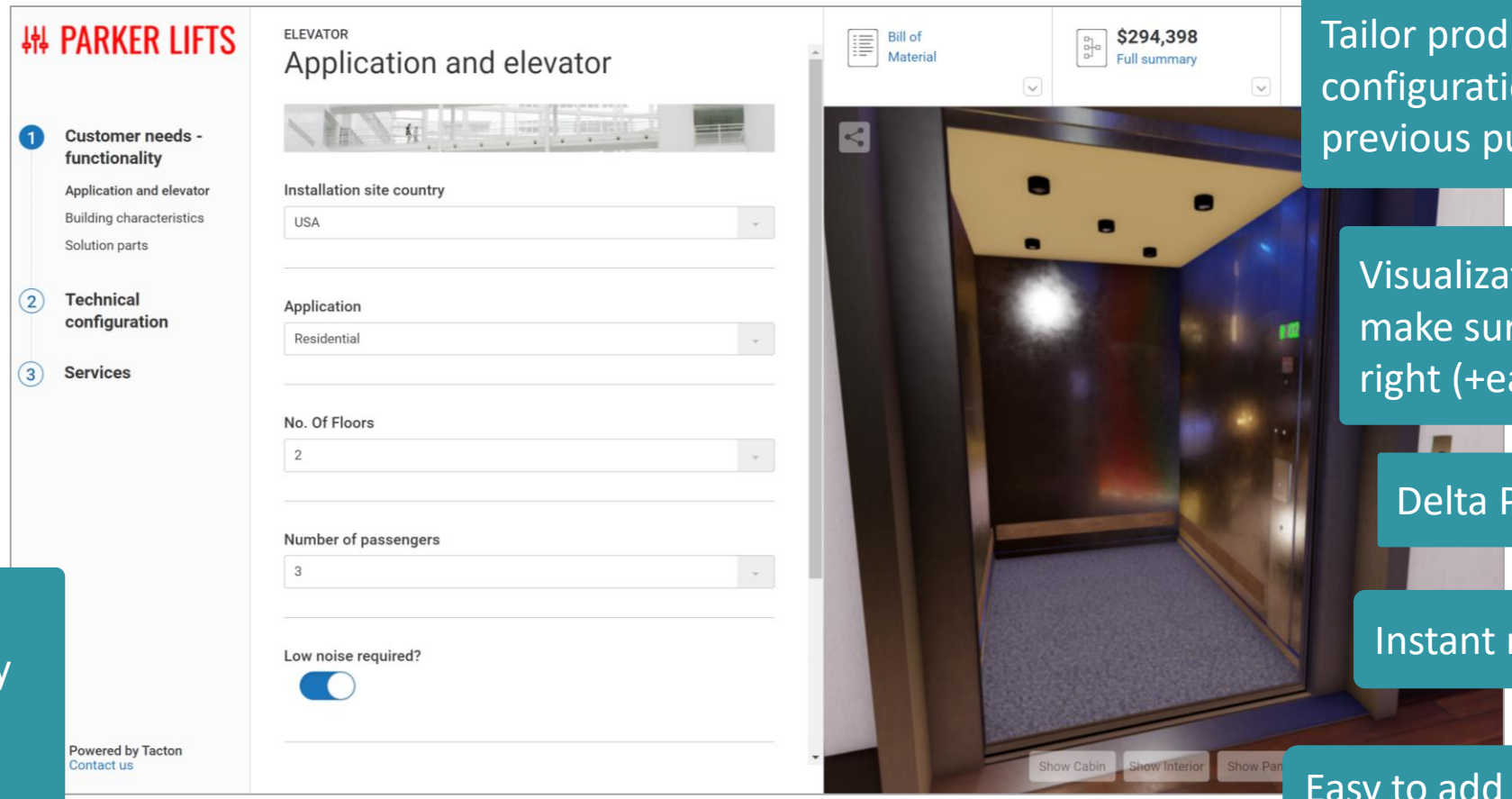
Visualization and AR to make sure product is right (+easy sharing)

Delta Pricing

Instant net prices

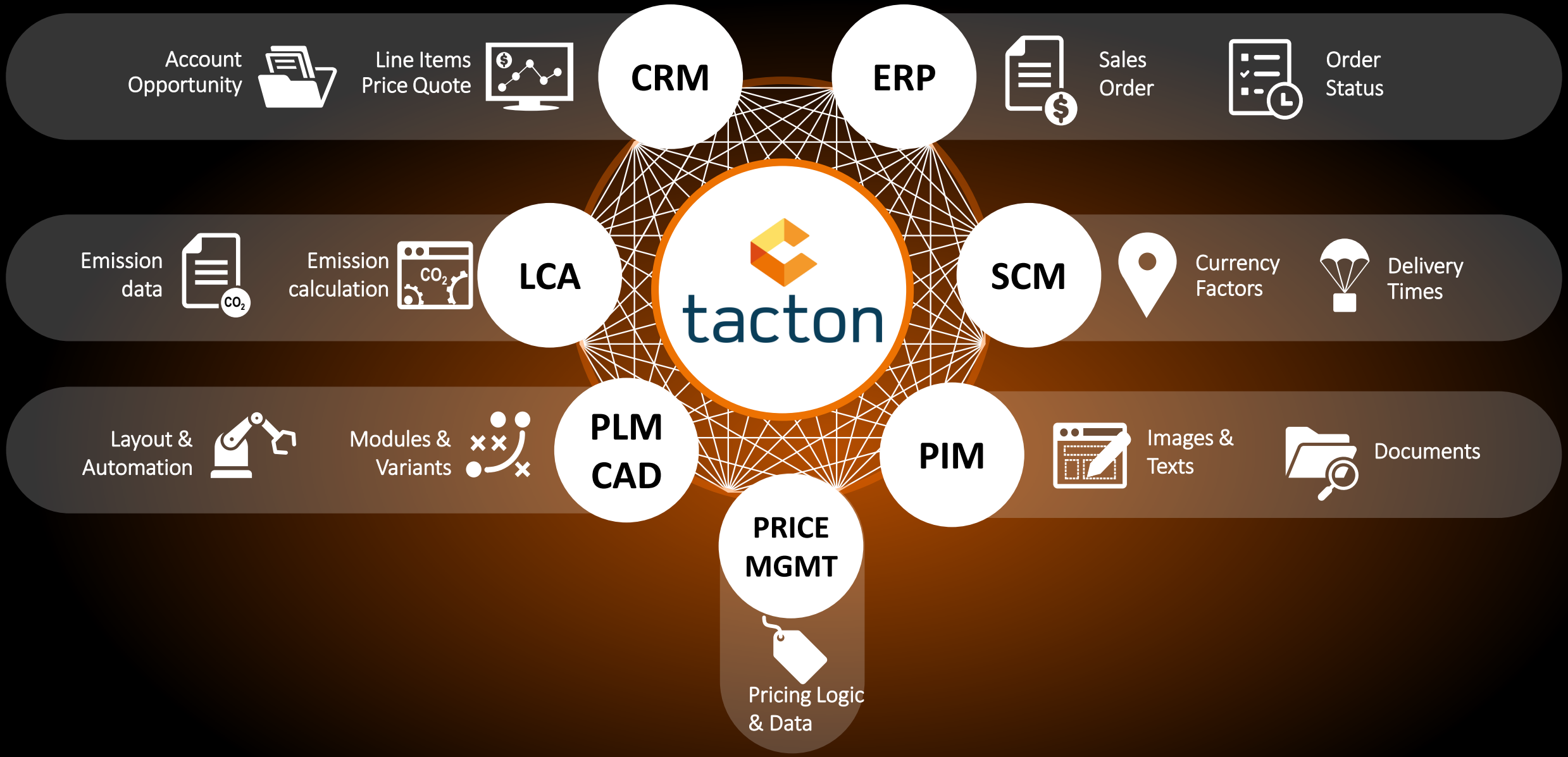
Easy to add accessories and add-ons

Optimize based on purchasing drivers



UI provided by Tacton's customer

Data accuracy: Tacton CPQ Data Management

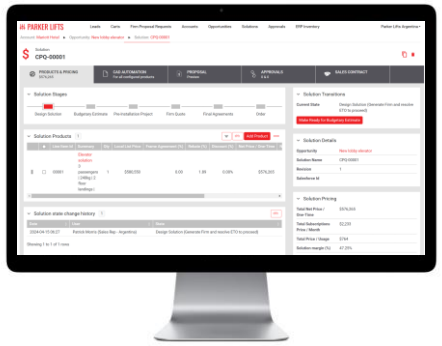


One source of truth ensures data accuracy and reliability

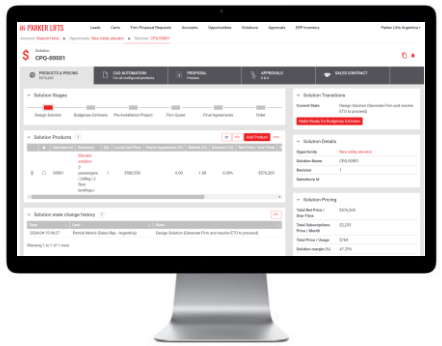
All channels driven by one source-of-truth product definition

Updates to your product or prices are immediately available in all channels

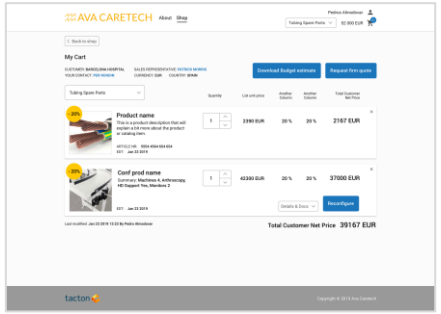
Direct Sales



Partner Sales



Self Service

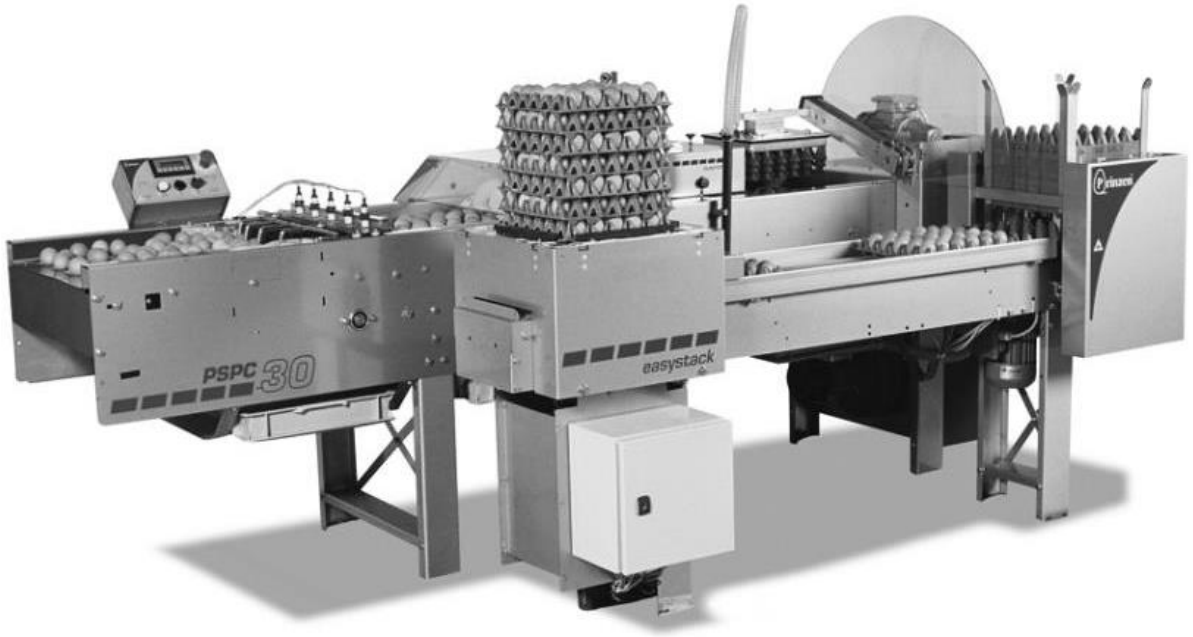


Always correct product and prices in all channels!

CPQ Administration
(centralized logic and data for product, pricing, document etc)

- Avoid product and pricing errors and
- Decrease your time-to-market for your latest and greatest products!

Let your customers and partners configure anything



Tacton’s smart configuration technologies

- can express millions of product variants (with configurator performance!)
- separates valid and buildable configurations from unprofitable ones
- 100% accurate technical solution and BoM ready to be sent to ERP

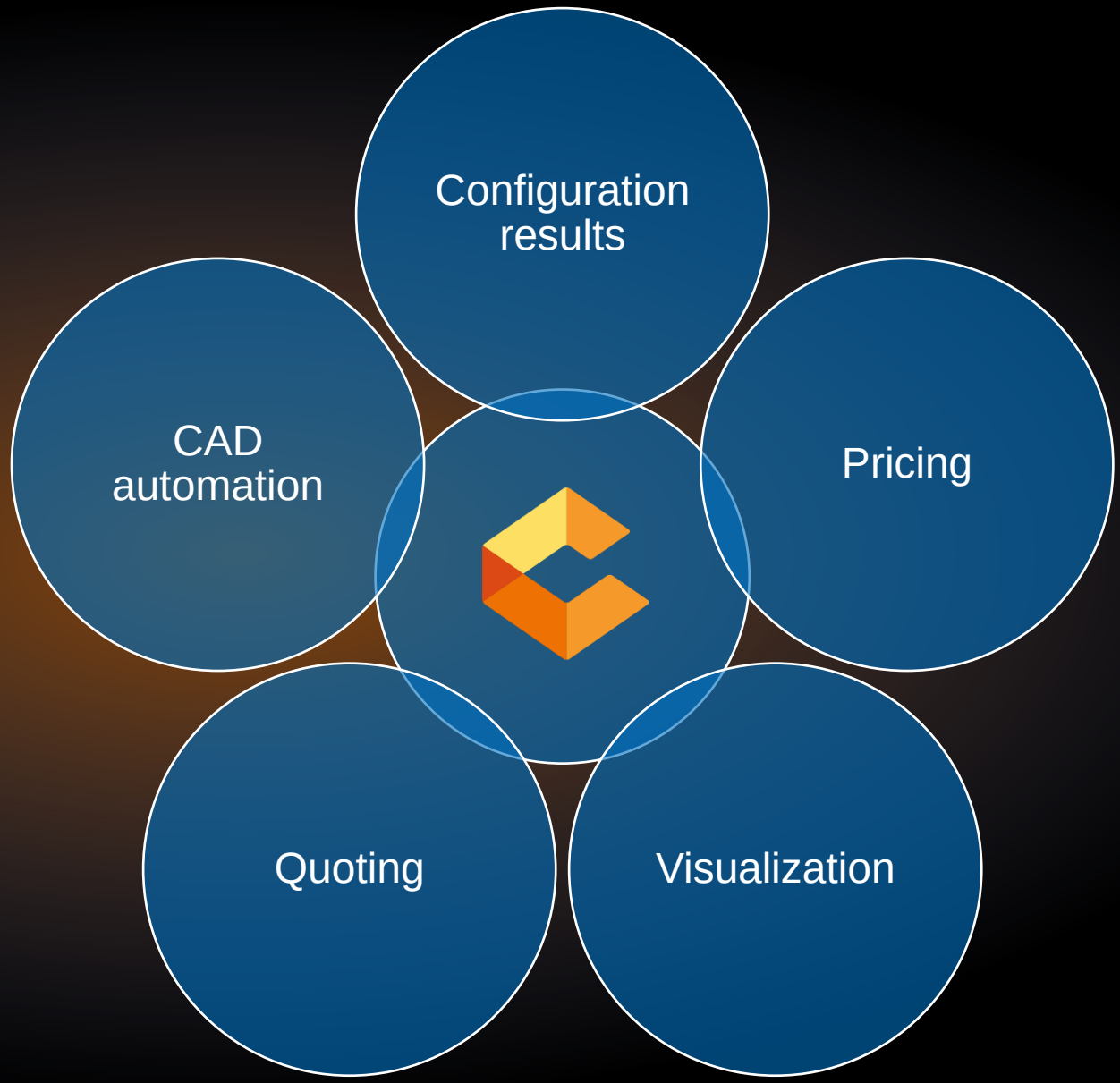
➔ **Sell your FULL portfolio online (not only spare parts)**

Flexible UI but integrated sales execution

Everything in a deal is connected – and needs to be aligned

Tacton native integrated platform ensures that all deal data is 100% correct at all times – without integrations to other systems or vendors. For all sales channels.

Minimize integration hassles and maintenance costs



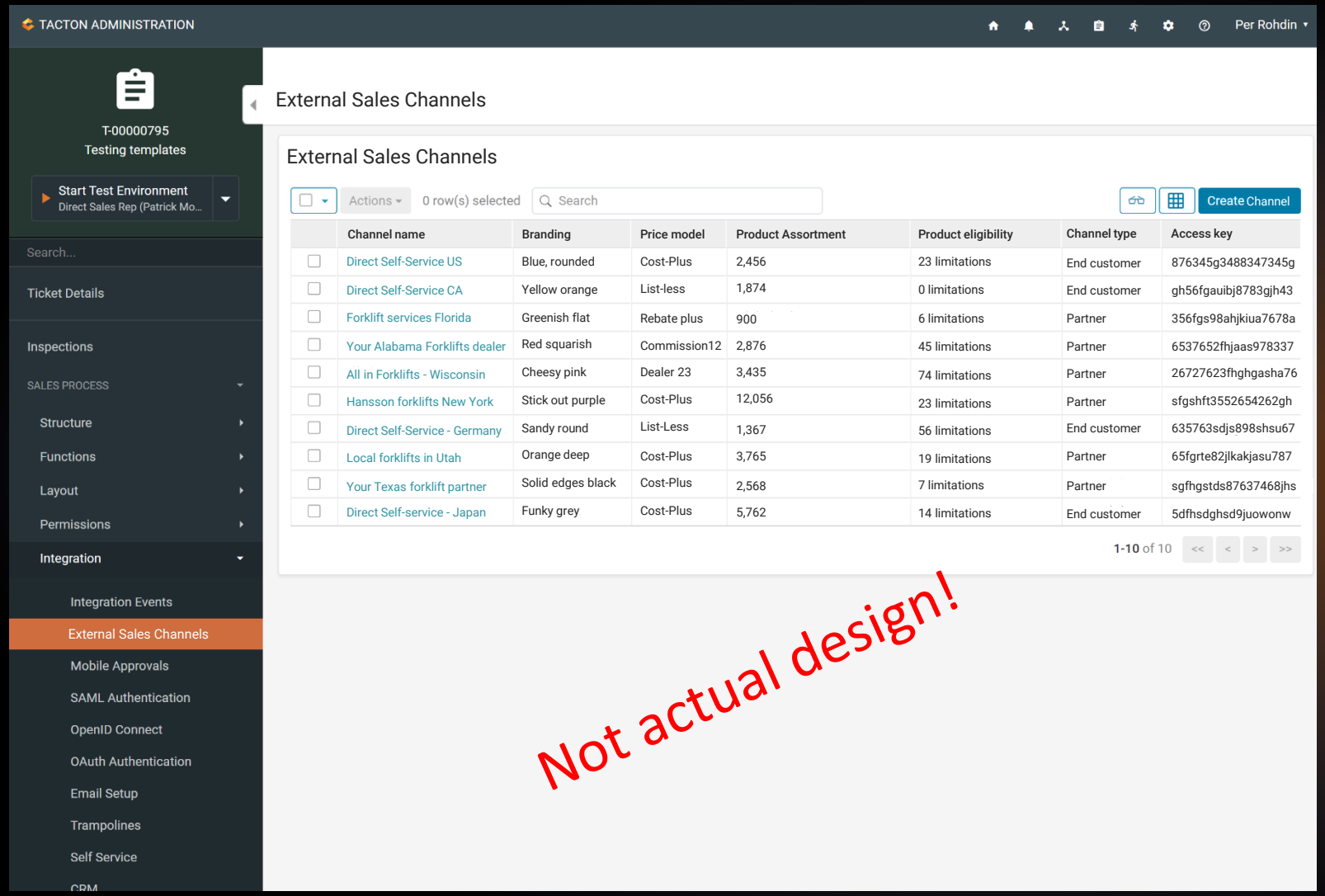
”

Tacton CPQ Omnichannel Improvements:

Self-Service Channels

Roadmap features 2024 and onwards

Self-service Channels



Create any number of Sales Channels

Settings per channel:

- Assortment in product catalog
- Assortment in configured product: In the offered configurable products, what selections/ assemblies/ module variants should be offered?
- User experience
  - What questions should be presented to user and how?
  - Branding/Graphic design: Colors, padding, fonts, rounded corners etc.
- …

Sales channel UI components

Product Catalog

Browse, filter, search and select configurable and non-configurable products to add to cart

Includes Product selector (for customers with hundreds of product models)

Main config dialog

Questions (radio, multiple choice, drop down, text input etc.), notifications, images, conflict resolution

Configuration navigation

Groups and tabs of the configuration

BoM & Pricing

Sales BoM and executed prices after every config selection

Visualization

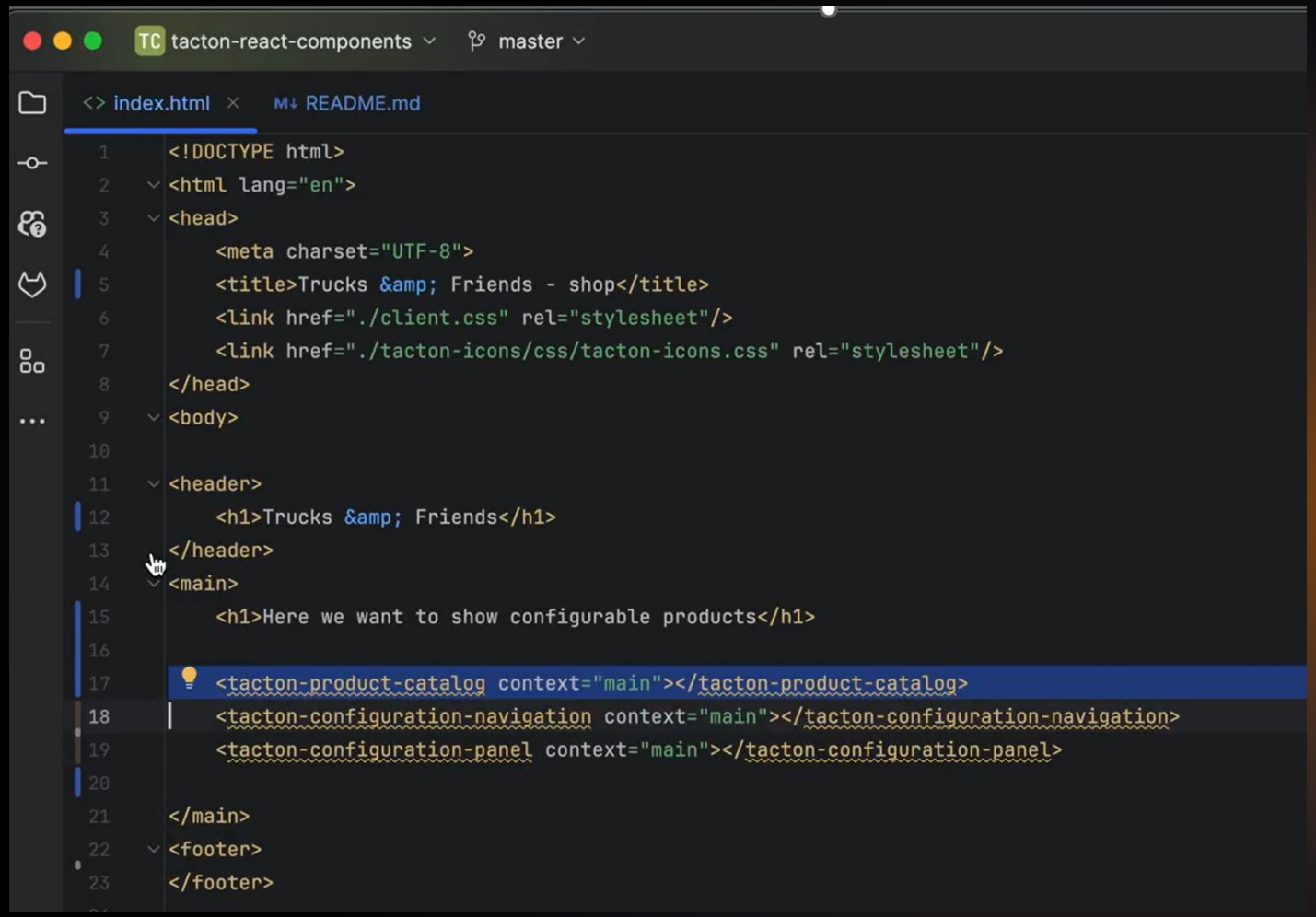
Viz, Viewpoints, Fullscreen, sharing and AR

Summary/ Info Group panel

The most important selections in the configurator

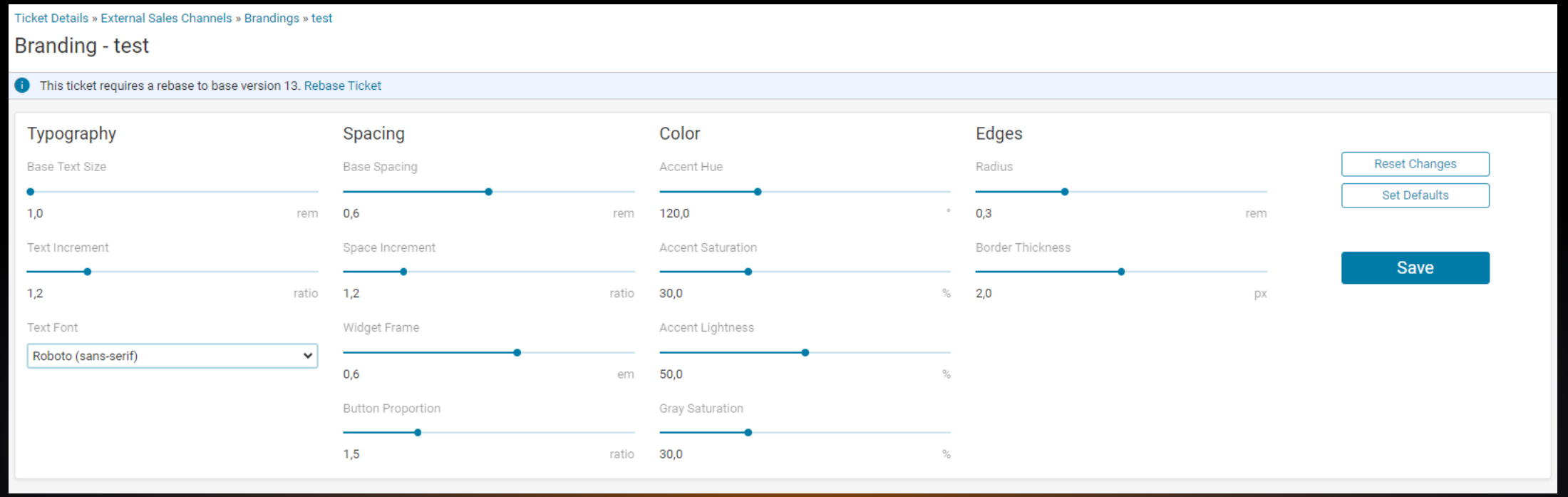
....

Each UI component has a code snippet



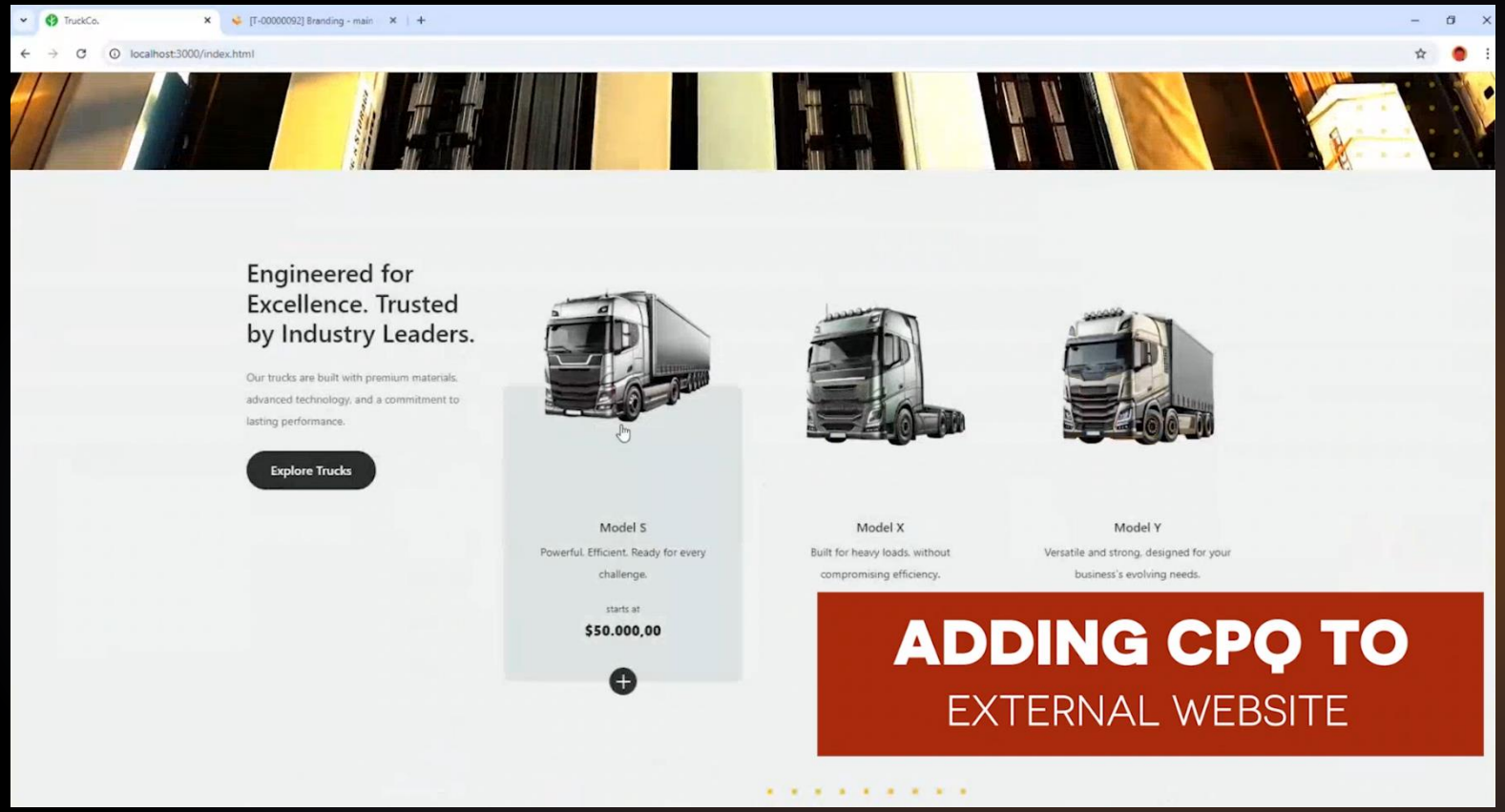
- Configuration navigation
- BoM & Pricing
- Product Catalog
- Main config dialog
- Visualization
- Summary

Flexible Branding in Tacton Admin



- Support more branding capabilities for the components to match the webpage it will be used on
- Can be channel specific

Easily embeddable – video!

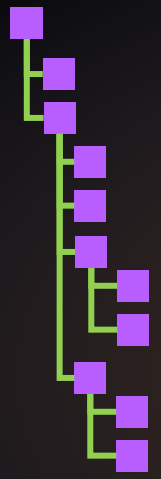


- Composable: position the components at will on any webpage
- No coding skills required
- Modern web technologies (JSON and REACT) ensures compatibility with web publishing platforms and digital commerce platforms
- Adjust visual appearance (and other settings) in the Sales Channel in Tacton Administration - > Immediately updated

Self-service support for System Configuration

Product (bounded)

A tree-style assembly structure with fixed/known positions

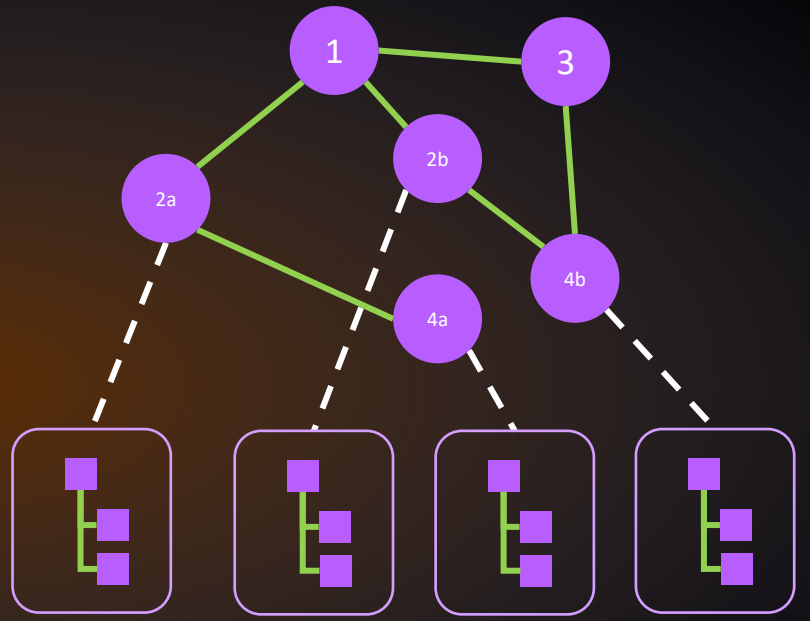


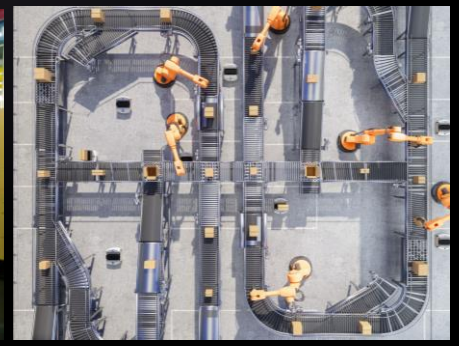
4 wheel positions

4-8 wheel positions (*Dynamics*)

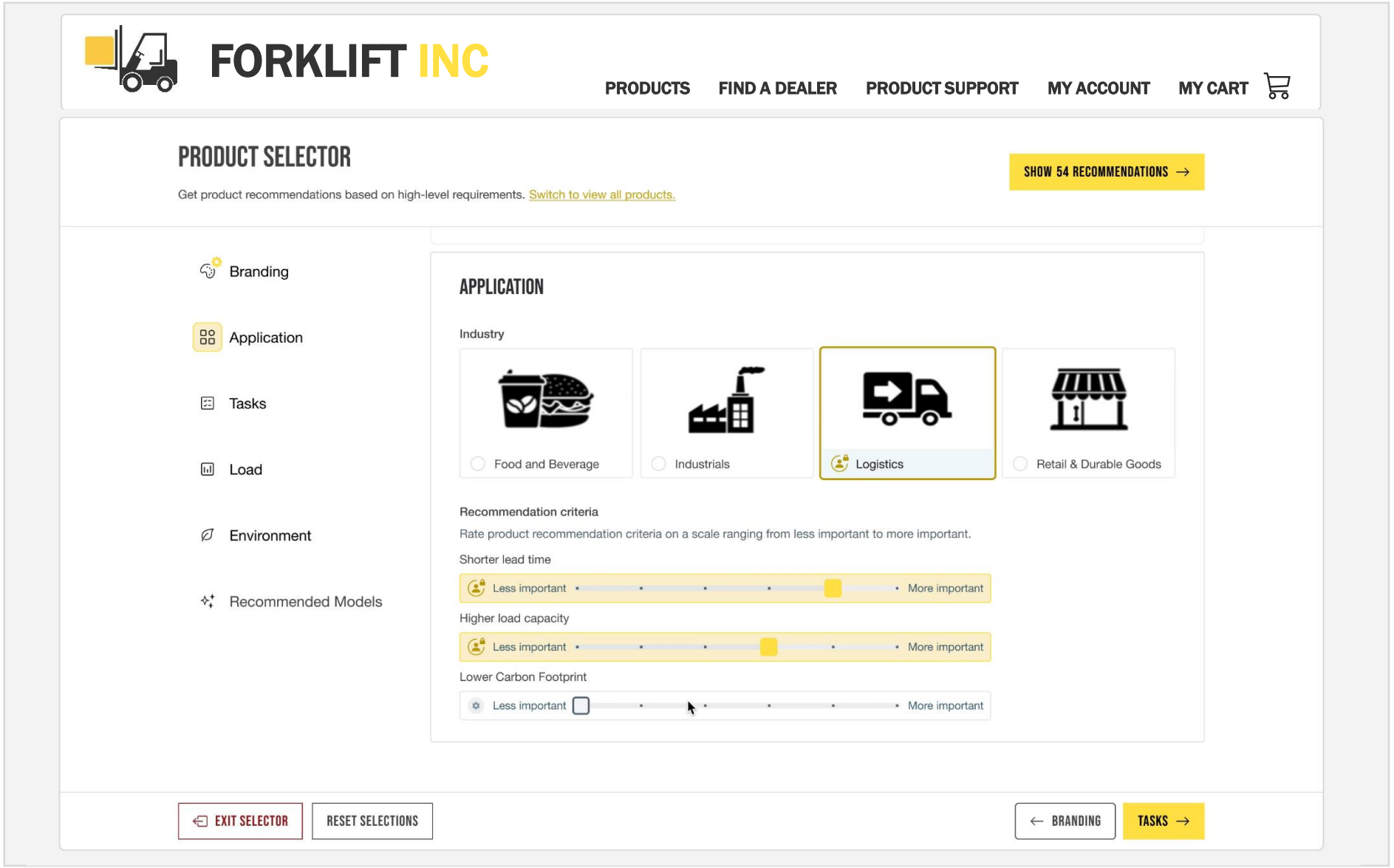
System (unbounded)

A system of many smaller constraint problems. Nodes can easily be linked and un-linked.



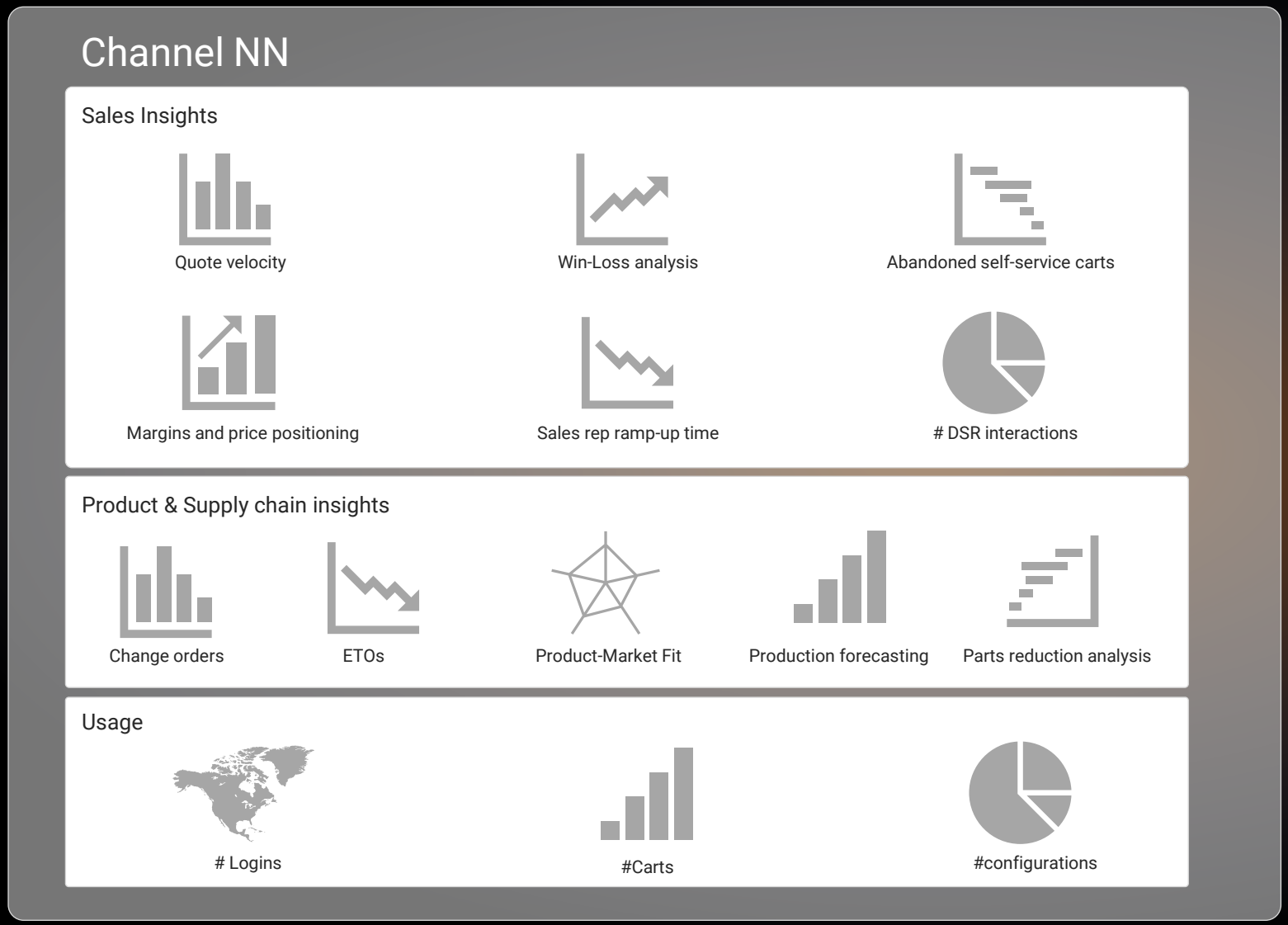


Product Selector: Easy to find the right starting point



If your online catalog contains hundreds of configurable products, the ***Product Selector*** makes it easy for your customer to find the right one to start configuring

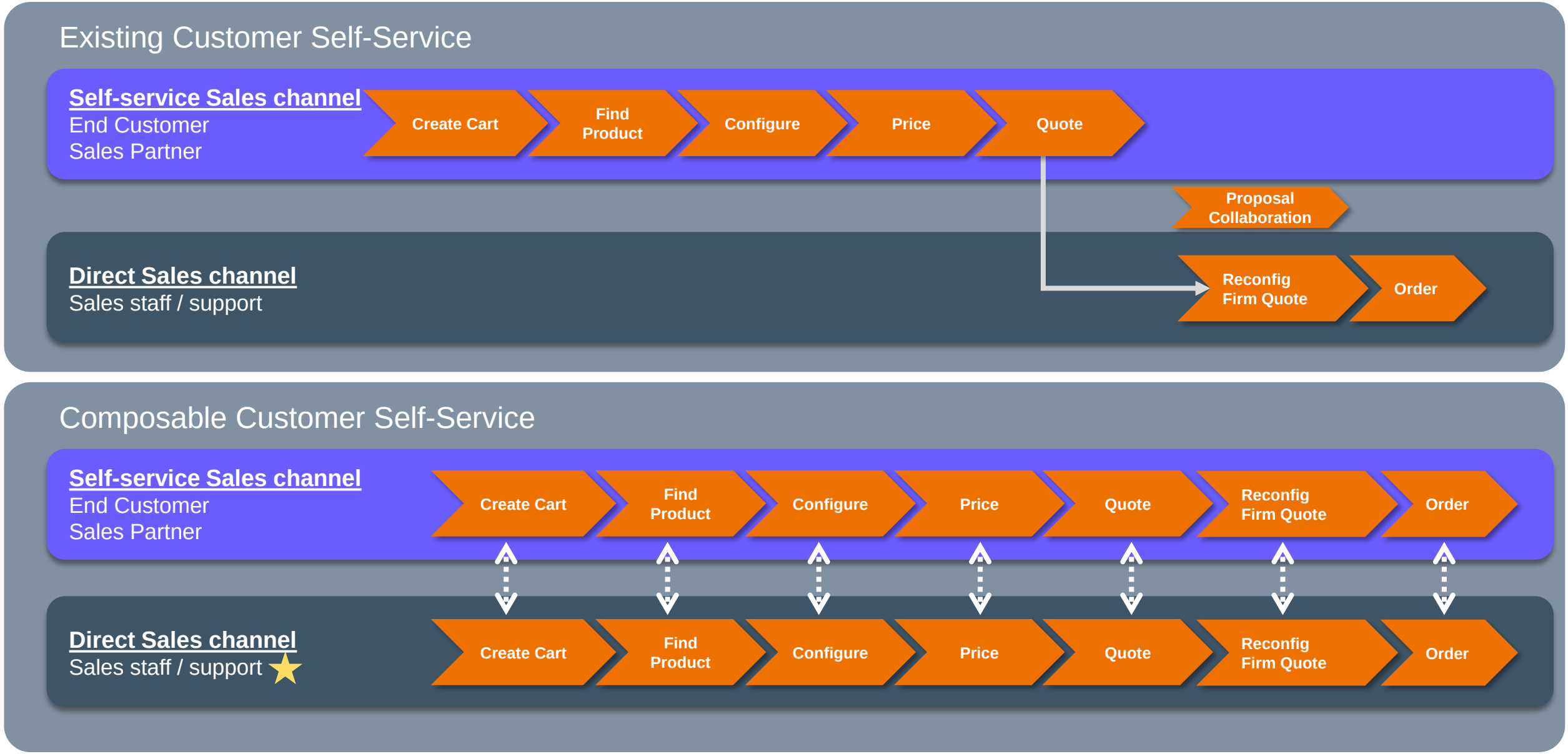
Future Capabilities: Channel Analytics



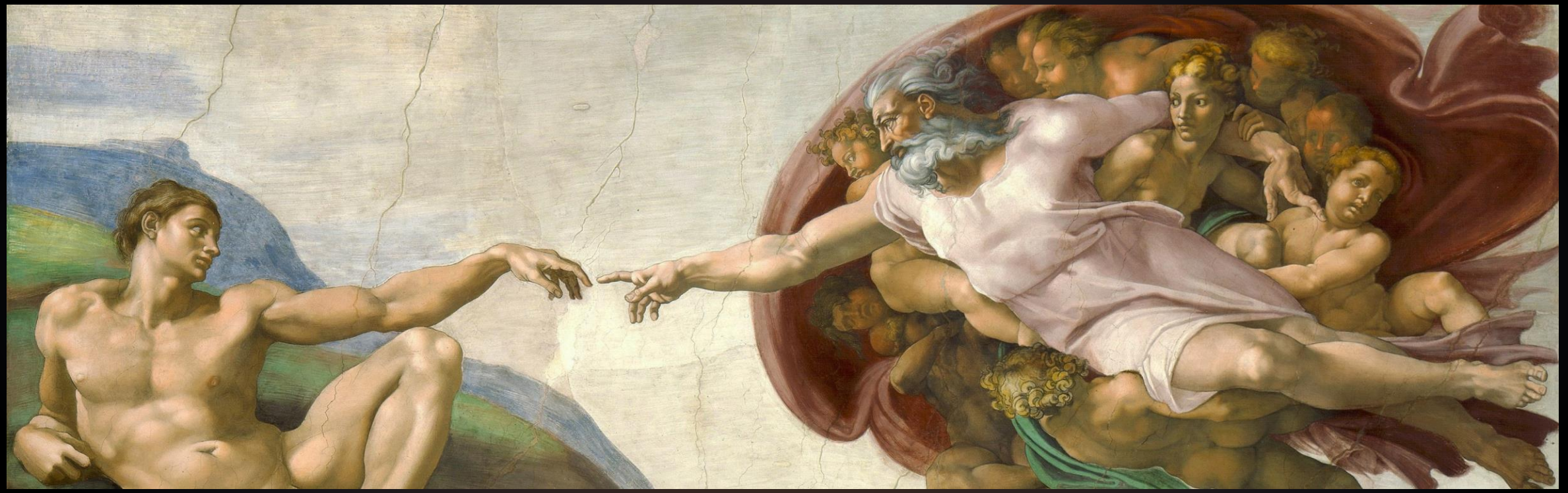
Actionable insights about sales channel performance

Unique data from CPQ - not found in other enterprise systems

Future Capabilities: Digital sales room / channel switching



Reach out!



Tacton CPQ Omnichannel Sales customers

https://www.tacton.com/products/tacton-cpq/omnichannel-sales/?wvideo=xpxk3p8lwa

HUSKY®

NORGREN®

rosenbauer

conf industries

PLUS PACK

The divide between B2B buyers and sellers

Buyer Expectations

Digital buying journey

Self-service

Immediacy

Value-based

Accuracy

Reliability

Seller Sales Execution

Analog/physical sales

Reliance on direct/partner only

Slow response times, especially for customizable products

Unable to explain the value of product features

Inconsistent product and pricing across buying journey and channels

Overselling

tacton

Closing

Tacton Summit 2024

tacton

Tacton Summit 2024