Welcome to Tacton Summit 2024

Tacton Summit 2024

Agenda

Day 1

10:00-10:20	**Welcome** Bo Gyldenvang, CEO Tacton
10:20-11:35	**Key Note: The Market Forces Transforming Go-to-Market Execution in Complex Manufacturing** Jeff Summers Chief Commercial Officer and Nils Olsson, Chief Customer Officer
	11:35-12:00 Coffee break and mingle
12.00-12.45	**Customer case: Cytiva** Johanna Höglund, Change Manager and Gustav Mena, PLM Manager - Sales Configurator at Cytiva, Anders Ingestedt, Services Product Manager Tacton
	12:45-14:15 Networking Lunch
14:15-15:00	**Customer case: Metso** Kristian Katilainen, Manager Product Competitiveness
	15:00-15:30 Coffee break and mingle
15:30-16:15	**Customer case: Bromma** Ingemar Lindström, Digital Transformation Lead and Joakim Heijbel, Director Digitalization and Sustainability
16:15-16:30	**Sum up, Jeff Summers, CCO Tacton**
	16:30-17:30 Networking drinks
	17:30 Dinner

Day 2

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 Buying,** Johan Jacobsson
14:15-14:45	**Omnichannel Sales,** Per Rohdin
14:45-15:00	**Sum up and Closing**, Jeff Summers CCO Tacton

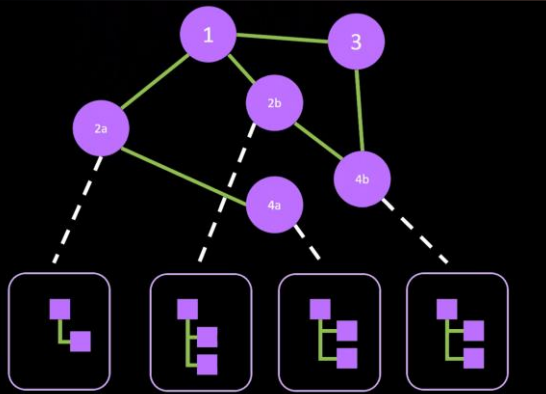# Tacton Partners at Tacton Summit 2024

Highlights since last Tacton Summit

Highlights since last Tacton Summit

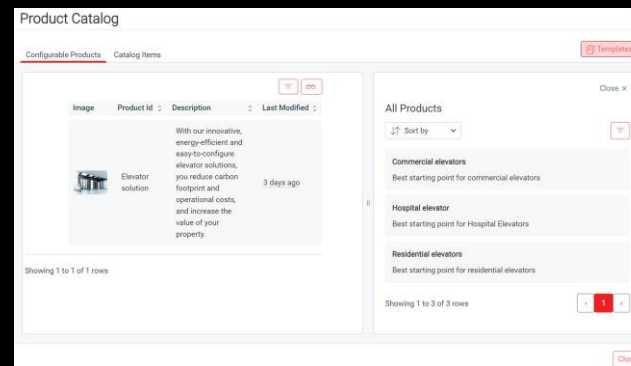**System Configuration**

Layout Planning

Configuration Find

Locked Currency Rates

Configuration templates

Delta Pricing

Tacton is The Leader of the Leaders

So what is next…?

AI will change the customer engagement
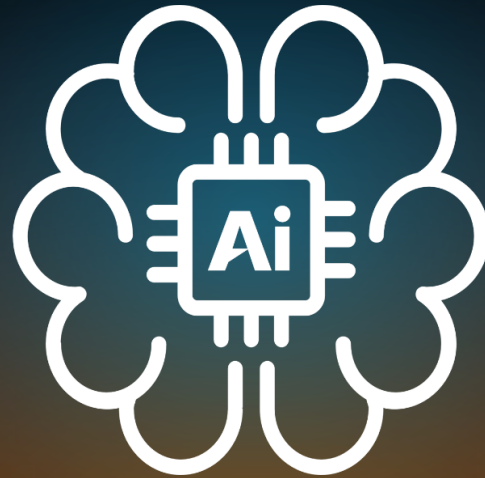
Translate RFP's directly into optimal quotes

Automatic translation of interface and product data

Secure highest margins in deals

Maximizing product fit based on customer data

Provide expert advise to customers

Upselling recommenda-tions

THE BUYER-CENTRIC SMART FACTORY

Account Opportunity

Line Items Price Quote

CRM

ERP

Sales Order

Order Status

Emission data

Emission calculation

LCA

tacton

SCM

Currency Factors

Delivery Times

Layout & Automation

Modules & Variants

PLM CAD

PIM

Images & Texts

Documents

1. The Buyers & Buying Process Have Changed

By 2025, 90% of the workforce will be digital natives.

Over 80% of the buying process now occurs WITHOUT engaging a vendor.
(It was 67% 3 years ago.)

Nearly 50% of today's buyers would prefer to NEVER interact with a salesperson.

2. Commoditization Drives New Differentiation

As commoditization increases...

NEW STRATEGY #1:

Outcome-Based Solutions Delivered as Managed Services

...differentiation becomes MUCH more difficult.

TIME

2. Commoditization Drives New Differentiation

As commoditization increases…

NEW STRATEGY #2:

Differentiating by engaging the buyer in more efficient, effective, and TRUSTED ways.

…differentiation becomes MUCH more difficult.

3. **Maximizing Consultative Expertise In EVERY Buyer Interaction Has Never Been More Critical**

GUIDED SELLING

Guided Solutions
Guided Services
Guided Upsell / X-Sell
Guided Pricing
Guided Visualization
Guided Sustainability
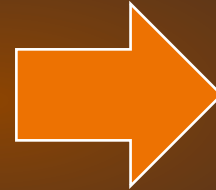
→ **GUIDED BUYING**

4. Brain Drain Cripples Competitiveness

Employee Turnover in Industrial Manufacturing was 37% in 2023 – it's LOWEST in 3 years.

HOW TO CODIFY & PRESERVE?

Product Knowledge?

Sales Knowledge?
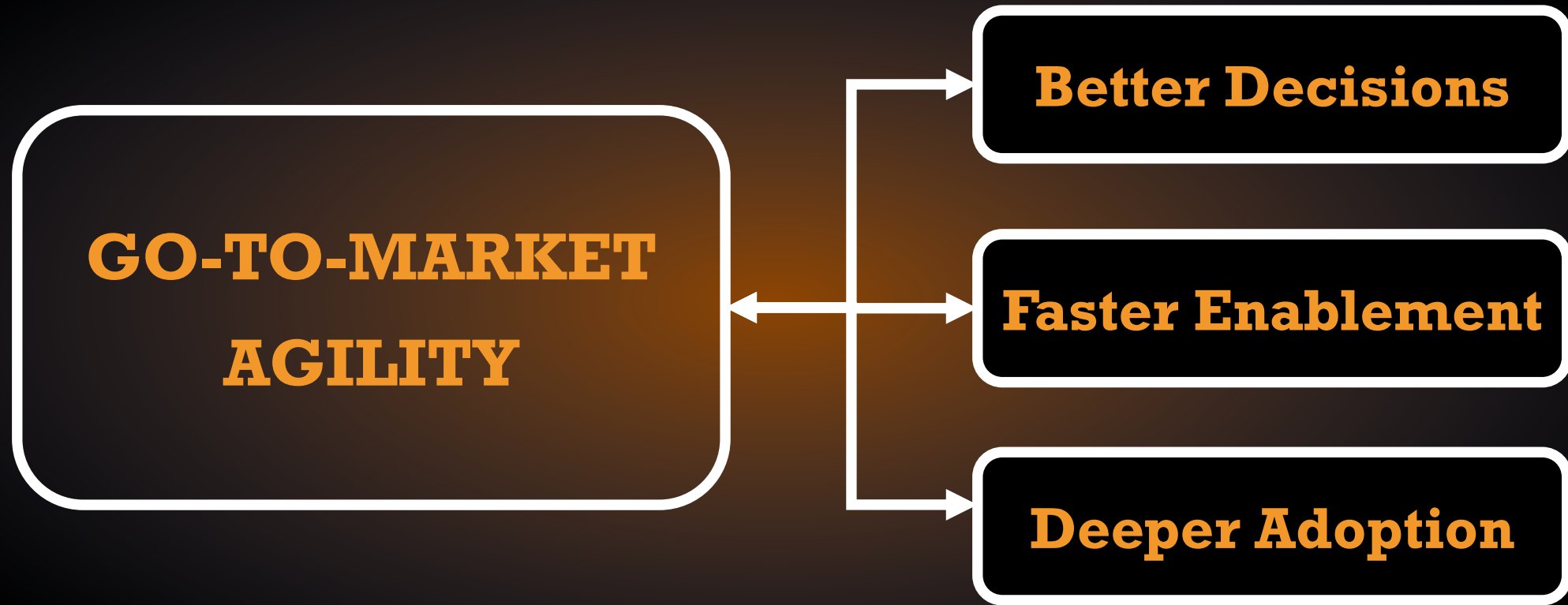
Engineering Knowledge?

Regulatory Knowledge?

Competitive Knowledge?

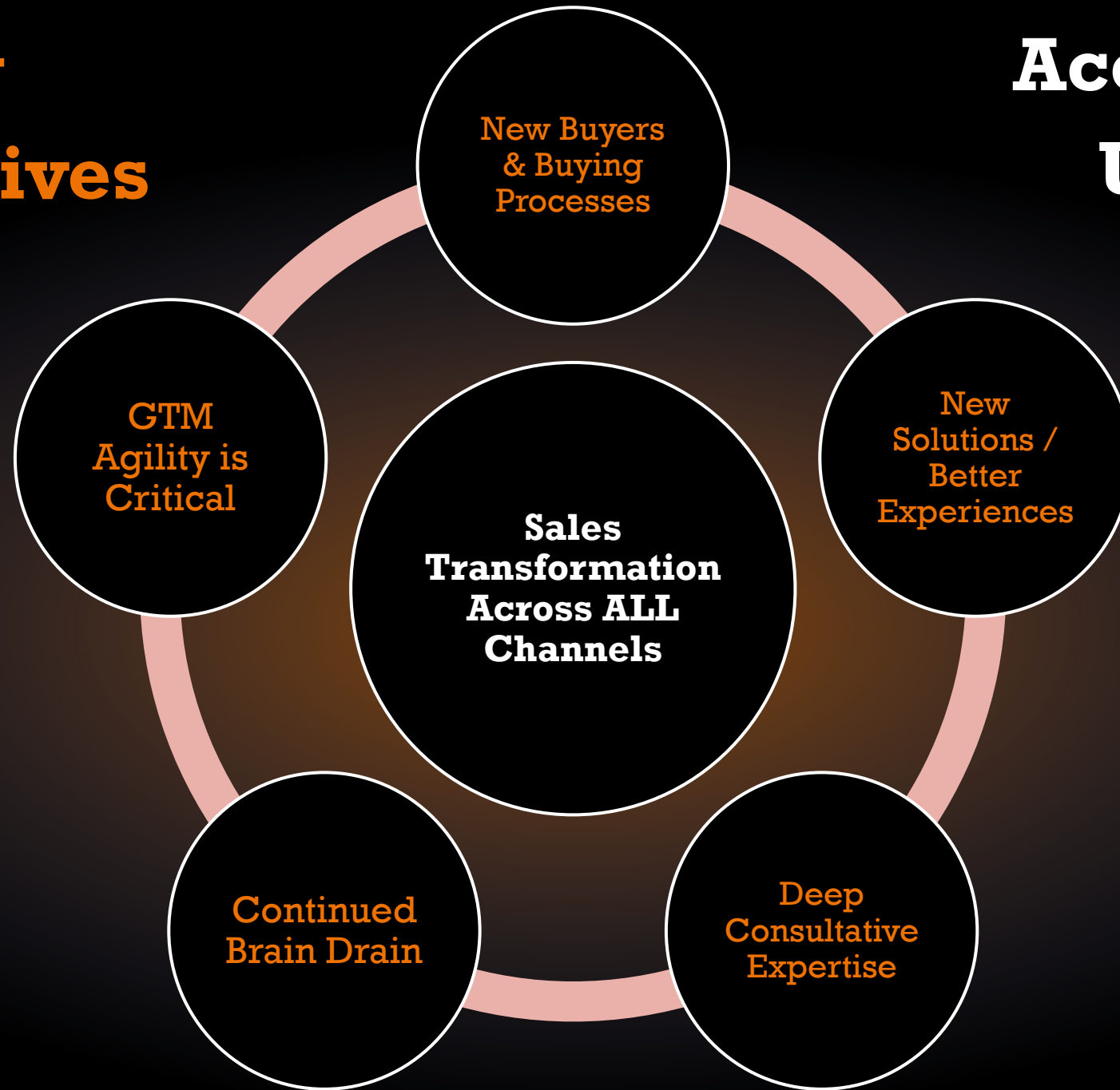**5.** **Both "Speed-to-Market" & "Speed-to-Sales" Have Never Been More Critical**

GO-TO-MARKET AGILITY

Better Decisions

Faster Enablement

Deeper Adoption
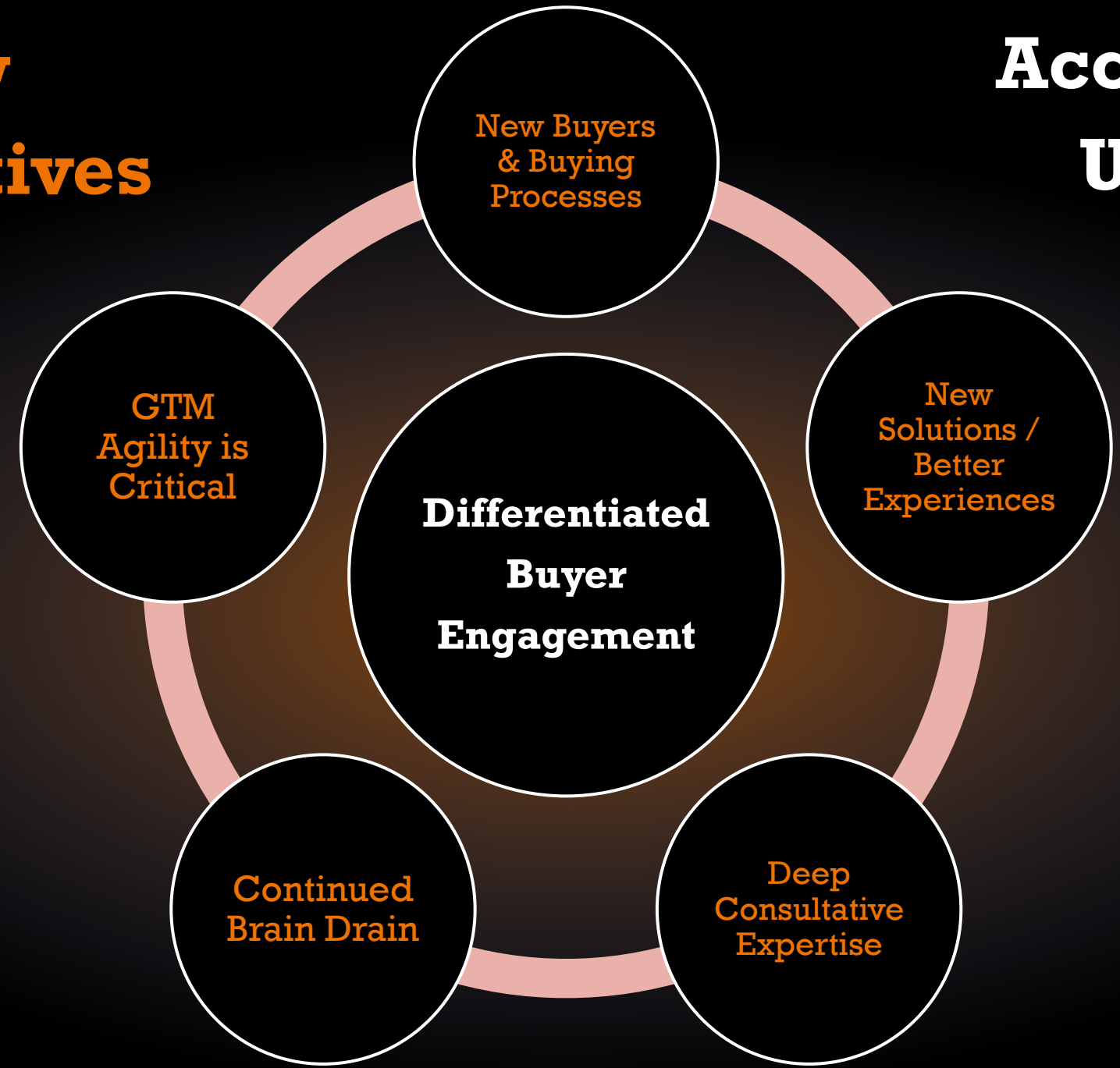
"CHIEF SOLUTION CONSULTANT"

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

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

tacton

Buyer

THE BUYER-CENTRIC SMART FACTORY

ERP

CRM

SCM

CAD

PLM

BI

DIFFERENTIATED BUYER ENGAGEMENT

Guided Product Selection

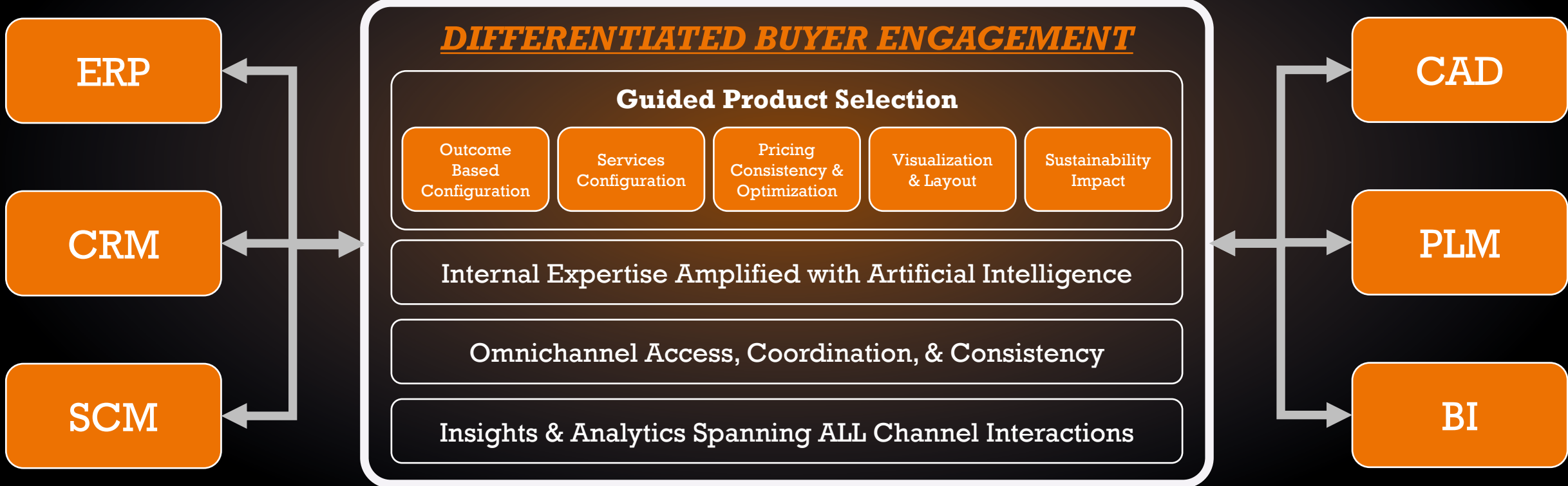| Outcome Based Configuration | Services Configuration | Pricing Consistency & Optimization | Visualization & Layout | Sustainability Impact |

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Buyer

THE BUYER-CENTRIC SMART FACTORY

DIFFERENTIATED BUYER ENGAGEMENT

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ERP

CRM
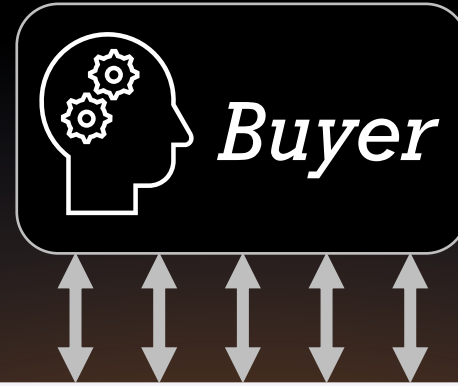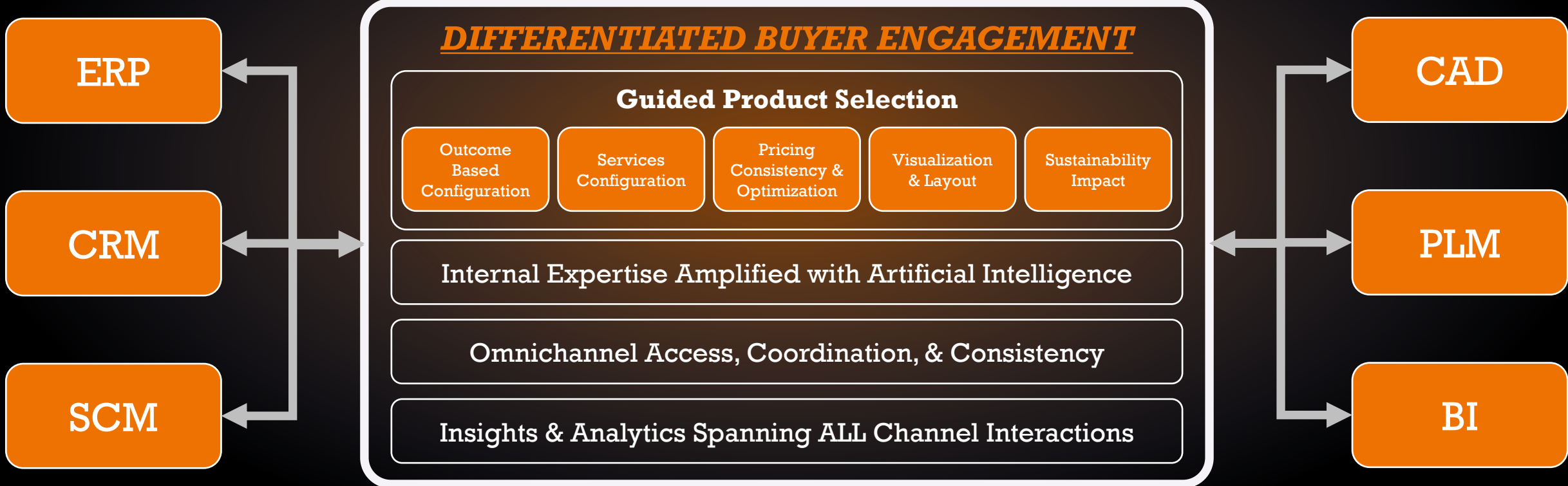
SCM

CAD

PLM

BI
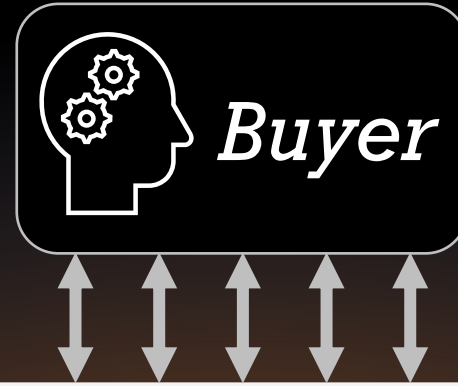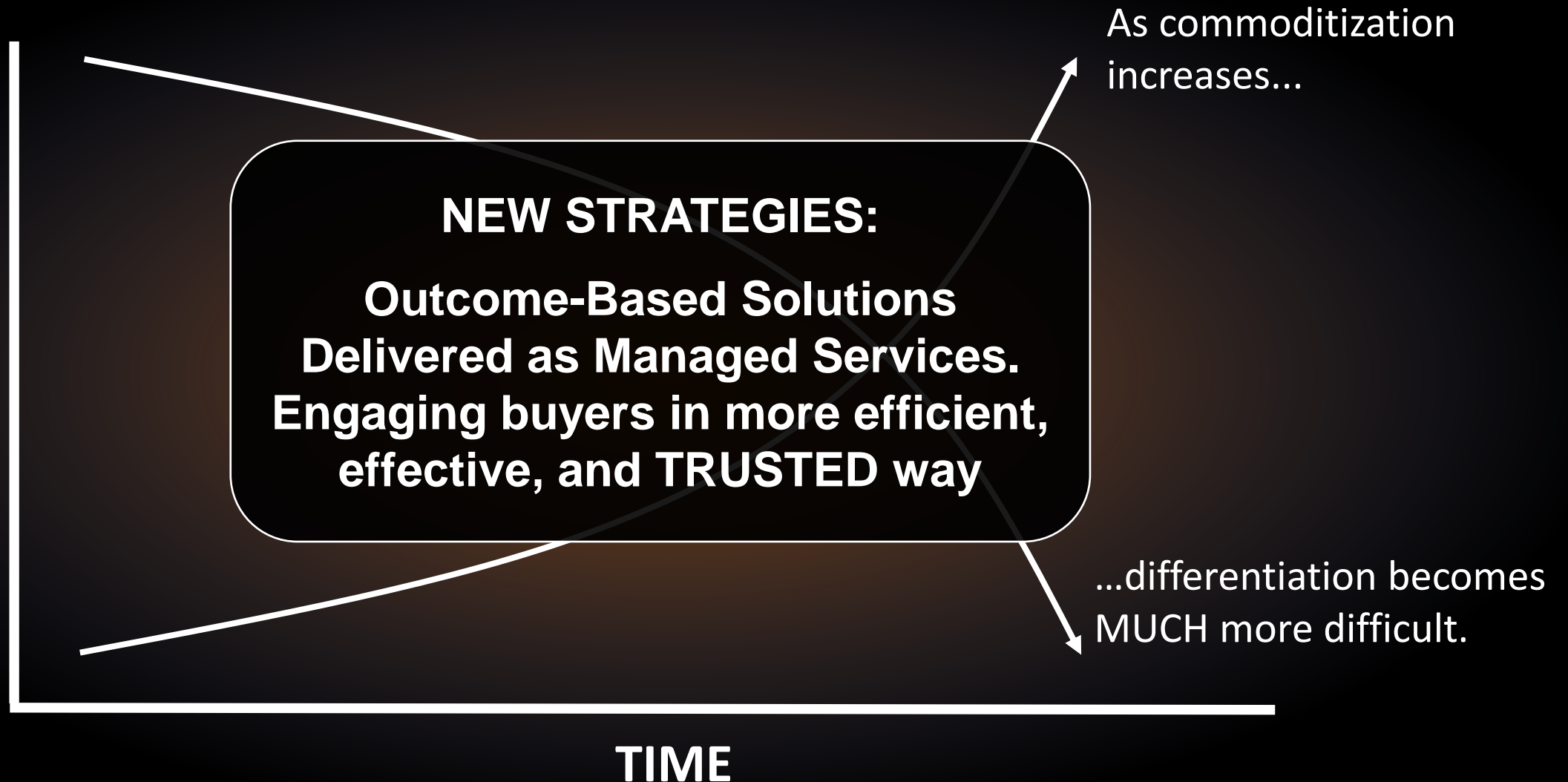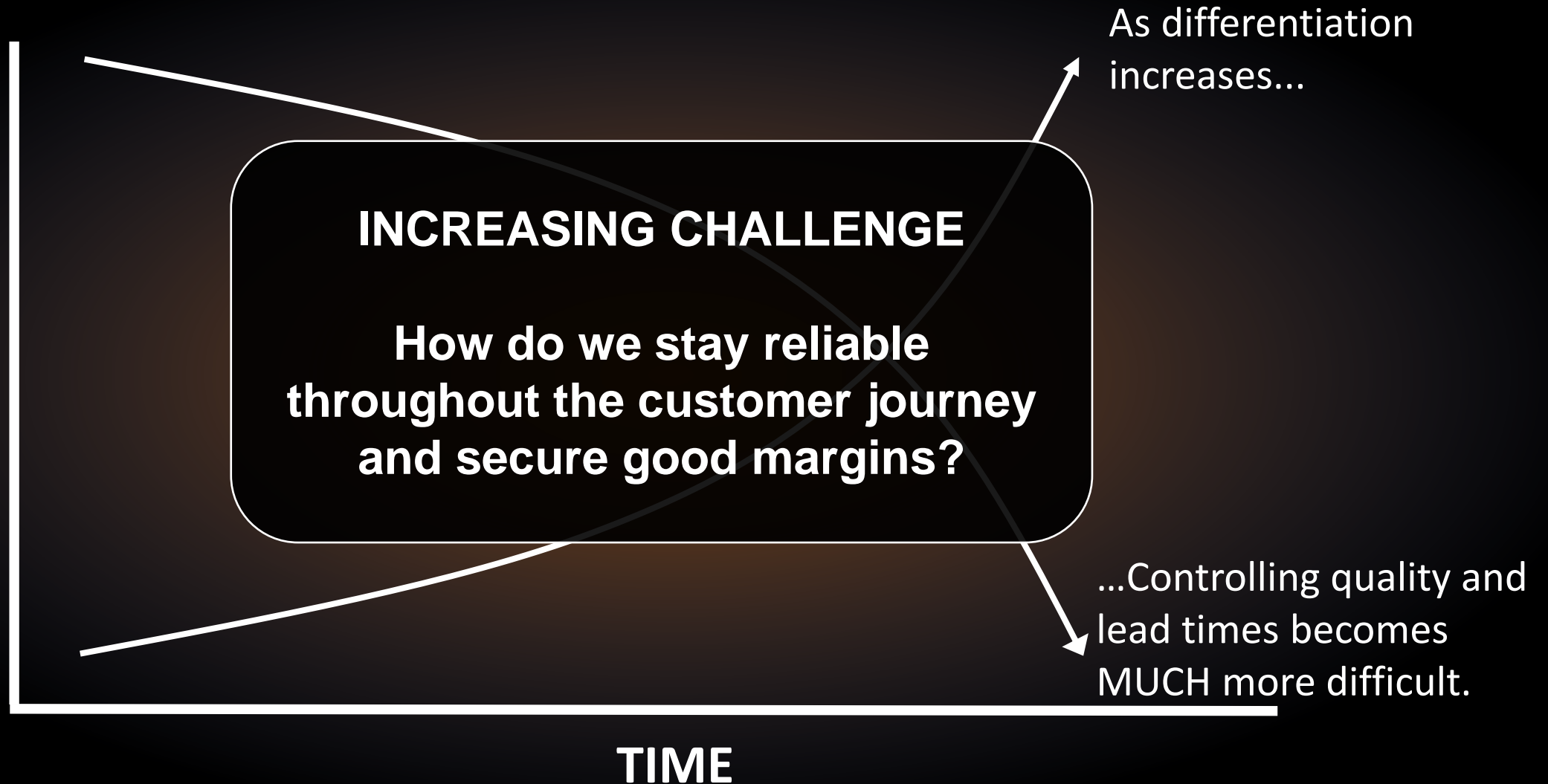
THE BUYING PROCESS HAS CHANGED

And it's placing pressure on Engineering and Operations

When 80% of the buying process occurs WITHOUT involving vendors. Reliable Expert advice becomes even more critical

A strong need to secure timely and correct delivery with maintained margins

IMPACTING ORDER FULFILMENT

As differentiation increases...

INCREASING CHALLENGE

How do we stay reliable throughout the customer journey and secure good margins?

...Controlling quality and lead times becomes MUCH more difficult.

TIME

IN THE PERFECT WORLD
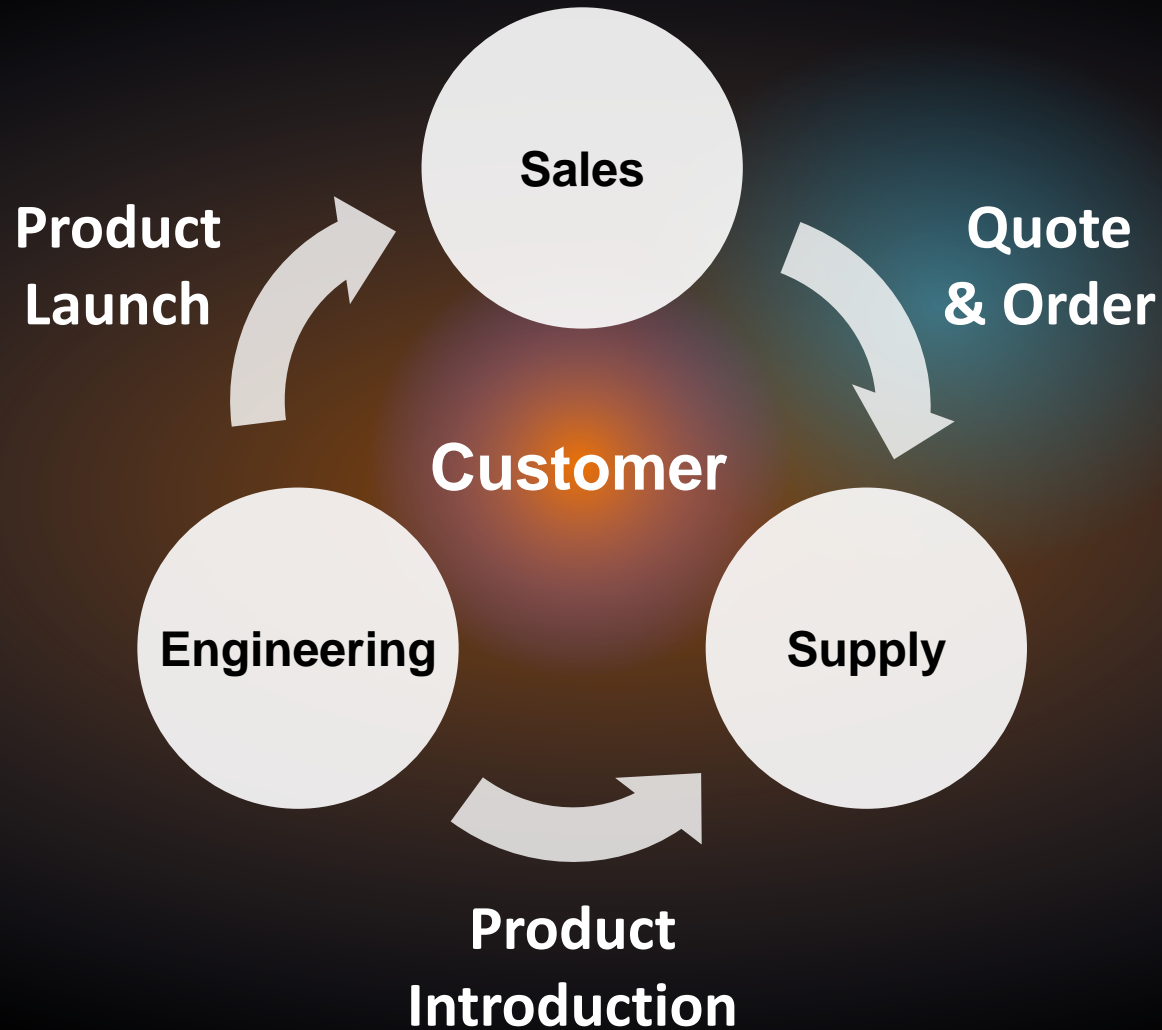
THE ENGINEERING BOTTLENECK

Sales

Engineering
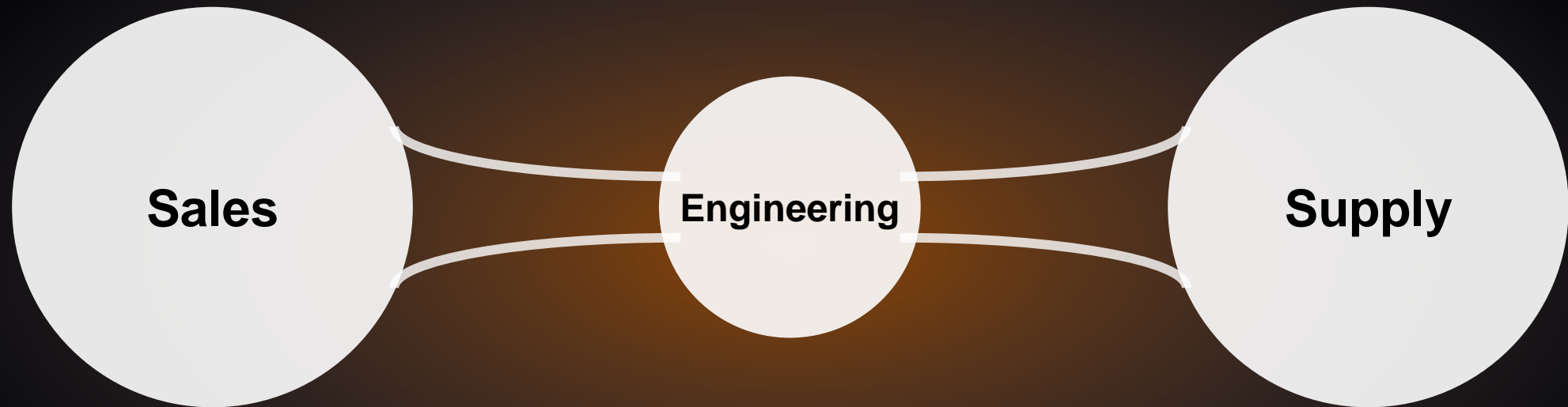
Supply

THE FOUNDATION OF GOOD MARGINS

Control of Quality and Leadtime

- Customer "Specials"
- Order Management
- Production Planning
- Non-Conformity control
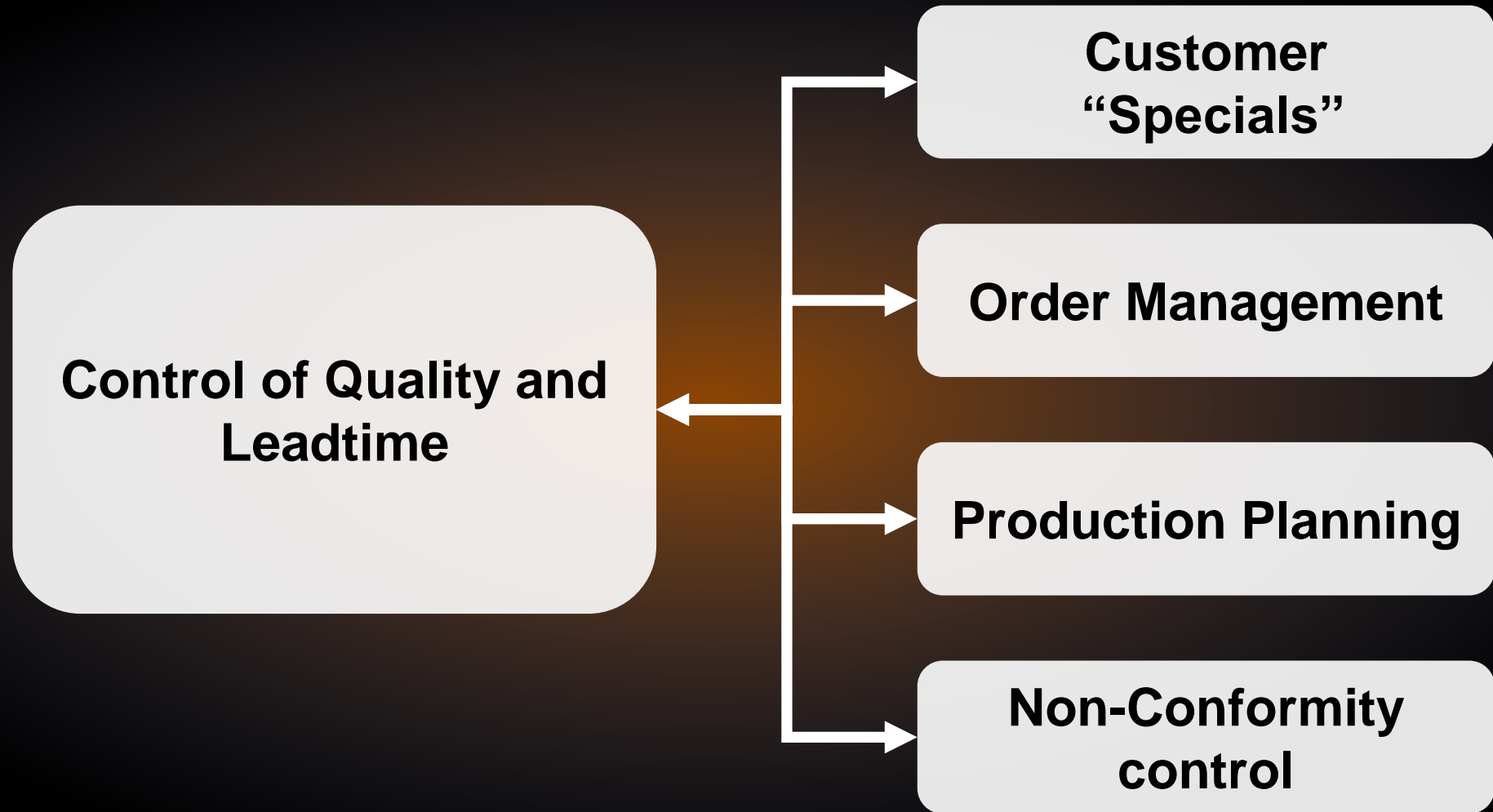
BRAIN DRAIN ALSO IN ENGINEERING

HOW TO CODIFY & PRESERVE?

Product Knowledge?

Engineering Knowledge?

Production/Assembly Knowledge?

Supply-Chain Knowledge?

After-Market Knowledge?

Systems Catering to Home Audience

IN THE PERFECT WORLD

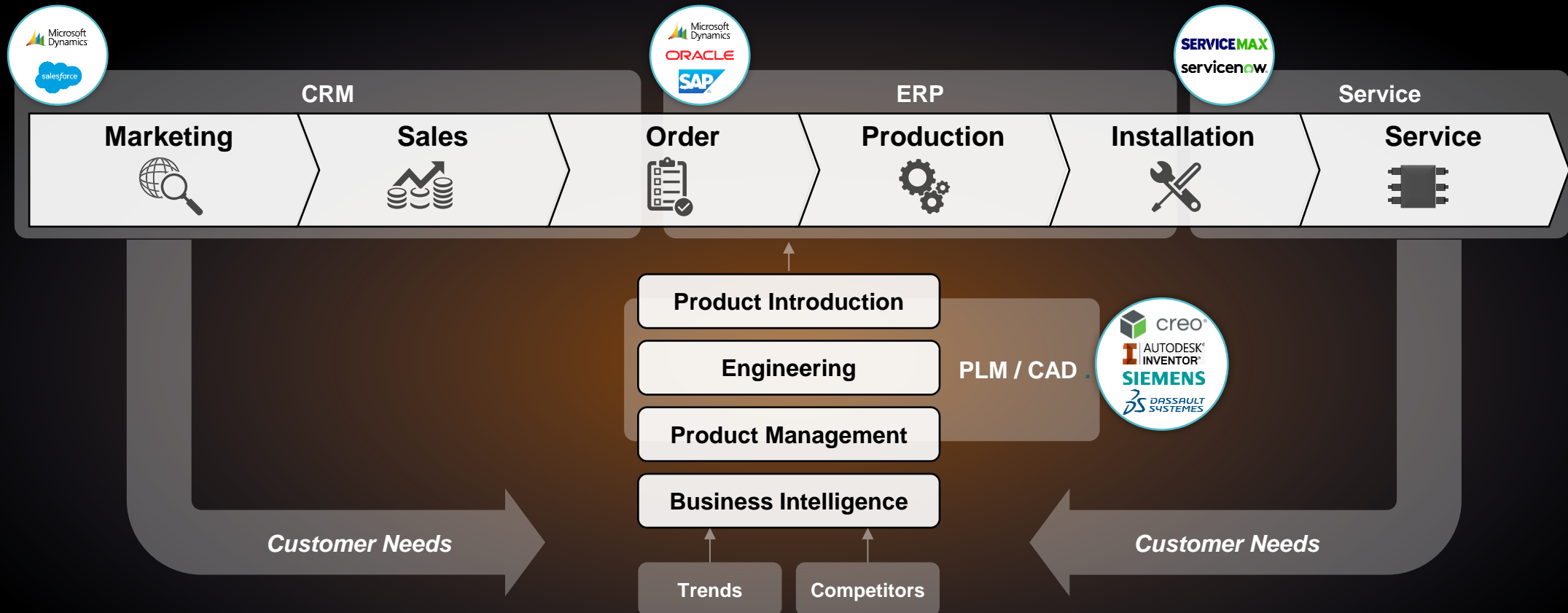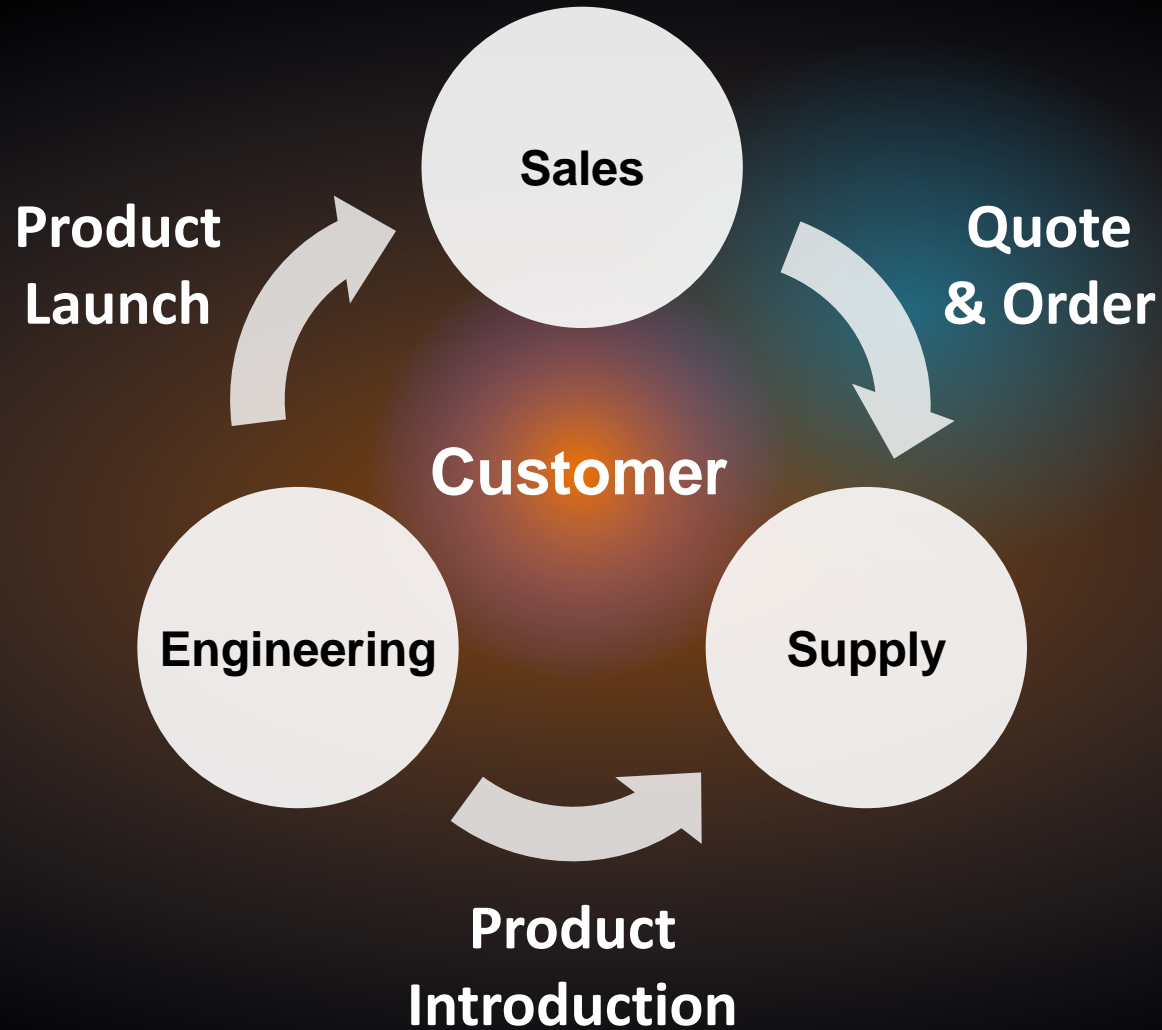# AI CAN HELP BRIDGE THE GAP

Ai

Sales

Supply

Predefined
Symbolic

Predictive

Machine Learning

Preemptive
Generative
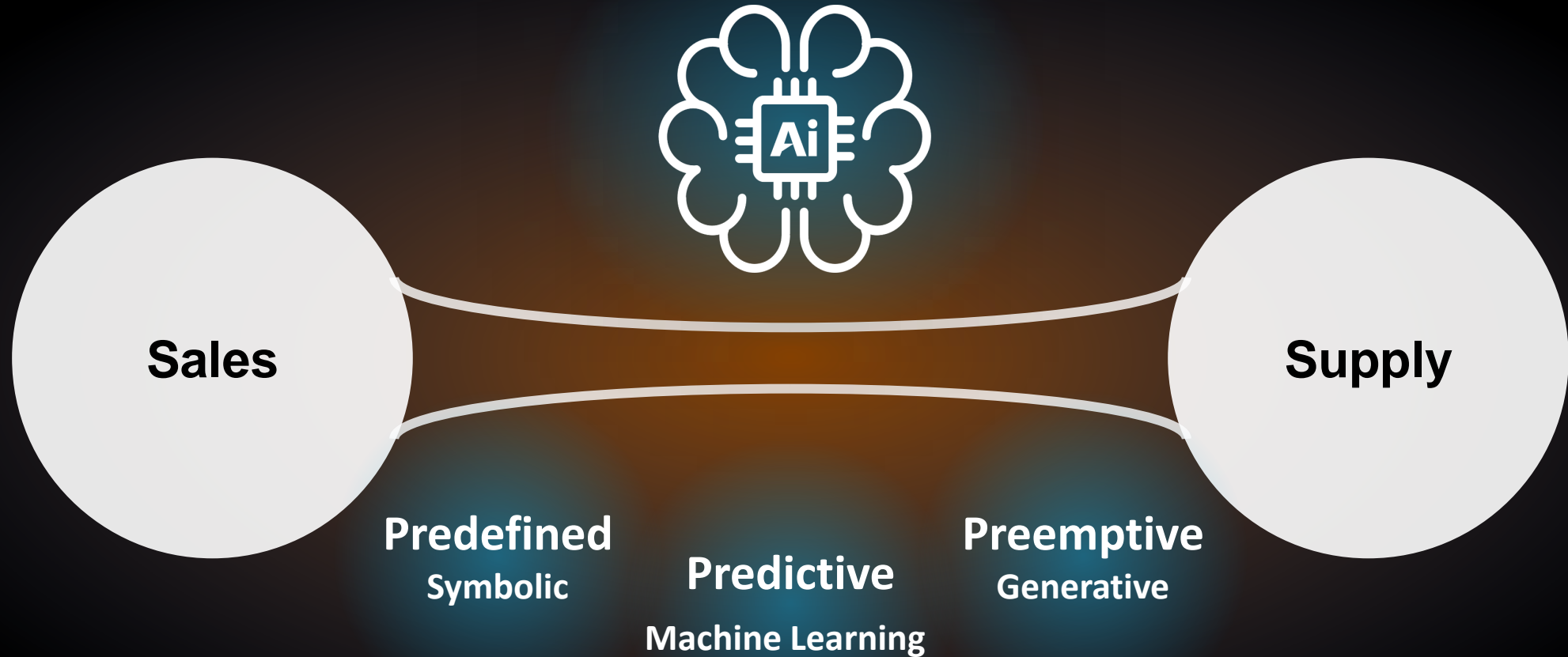
NEEDED AGILITY IN ENGINEERING

GUIDED BUYING

Guided Outcome

Guided Margins

Guided Orders

Guided Production/Assembly

Guided Supply-chain

PROFITABLE DELIVERY

THE BUYER-CENTRIC SMART FACTORY

Buyer

ERP

CAD

CRM

PLM

SCM

BI

ENGINEERING AND OPERATIONAL EXCELLENCE

Validation and Reliability

Digital Twins	Industry X.0	Lifecycle Mgmt	Quote & Order	Forecast & Planning

End-to-End Control of Quality and Leadtime

AI to Codify Technical and Operational Knowledge

One Source of Truth for Product Variance Data

Analytics to Trace and Eliminate Root Cause Issues

ONE SOURCE OF TRUTH FOR PRODUCT VARIANCE

Account Opportunity

Line Items Price Quote

CRM

ERP

Sales Order

Order Status

Emission data

Emission calculation

LCA

tacton

SCM

Currency Factors

Delivery Times

Layout & Automation

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Documents

Figure 1: Magic Quadrant for Configure, Price and Quote Applications

Tacton is a Leader in this Magic Quadrant due to increased market presence, a well-architected product and clear focus on the manufacturing industry.

Complex manufacturing industry: Tacton CPQ is the best solution for complex manufacturers evaluated for this Magic Quadrant. The ETO workflow and support for complex systems configuration are the best we evaluated for this report.

Extensibility: The application architecture and extensibility features of Tacton's offering are among the best evaluated. The performance of the demo shown to Gartner was excellent.

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

Gartner ® *Magic Quadrant for CPQ*

2020

2021

2022

2023

> **Tacton CPQ is among the best solutions** for complex manufacturers evaluated for this Magic Quadrant.

> …The application **architecture and extensibility** features of Tacton's offering are **among the best** evaluated…

> Tacton CPQ is **the most innovative product** evaluated for this Magic Quadrant.

Customer Case Cytiva

Johanna Höglund, Change Manager, Cytiva
Gustav Mena, System Owner, Cytiva
Anders Ingestedt, Project Manager, Tacton

cytiva

Team building and change management

Success factors for CPQ Deployment

Tacton Summit, October 10 2024

Gustav Mena

System Owner

Project requestor

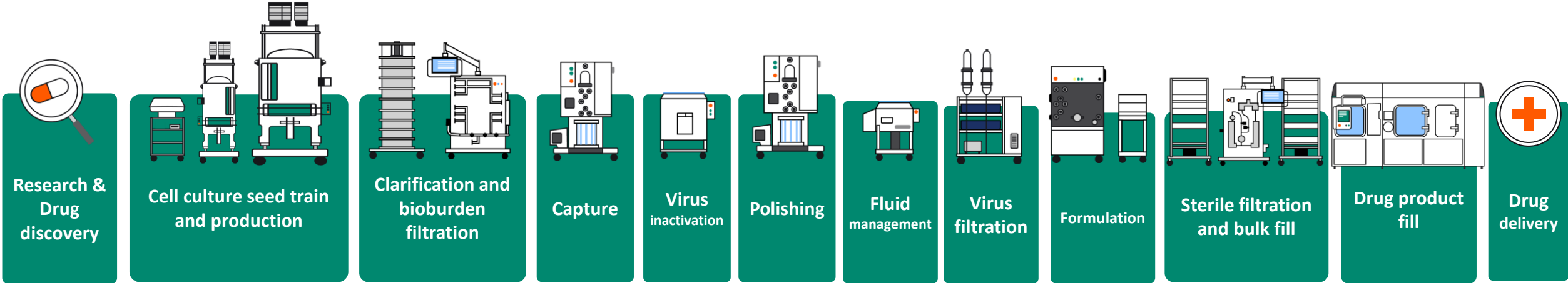**Johanna Höglund**

Cytiva Project Manager

Change Manager

Anders Ingestedt

Tacton Project Manager

Complete solutions for monoclonal antibodies (mAbs)

| Research & Drug discovery | Cell culture seed train and production | Clarification and bioburden filtration | Capture | Virus inactivation | Polishing | Fluid management | Virus filtration | Formulation | Sterile filtration and bulk fill | Drug product fill | Drug delivery |

cytiva | PALL PALL | cytiva PALL | cytiva | PALL | cytiva | PALL | cytiva | PALL

Services and support

Majority of mAbs approved by the FDA in 2020 use Cytiva technologies in manufacture

Deep expertise and global scale

15 000
associates in 40+ countries

4
key hubs

> 4000
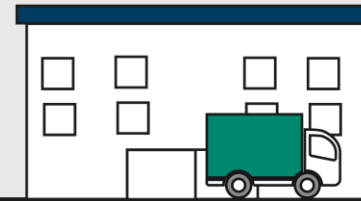commercial associates serving 100+ countries

36
manufacturing sites
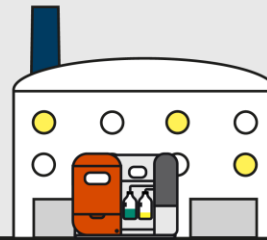
> 100
FlexFactory™ and KUBio™ facilities
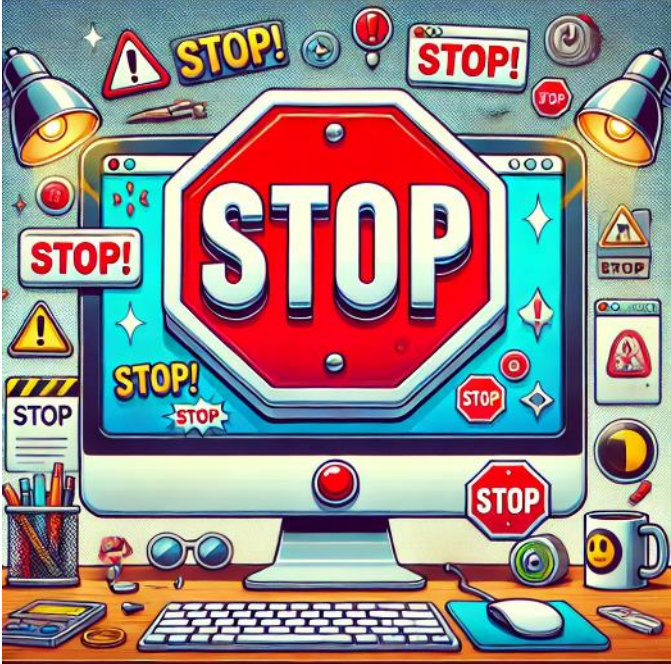
23
R&D and innovation centers

96%
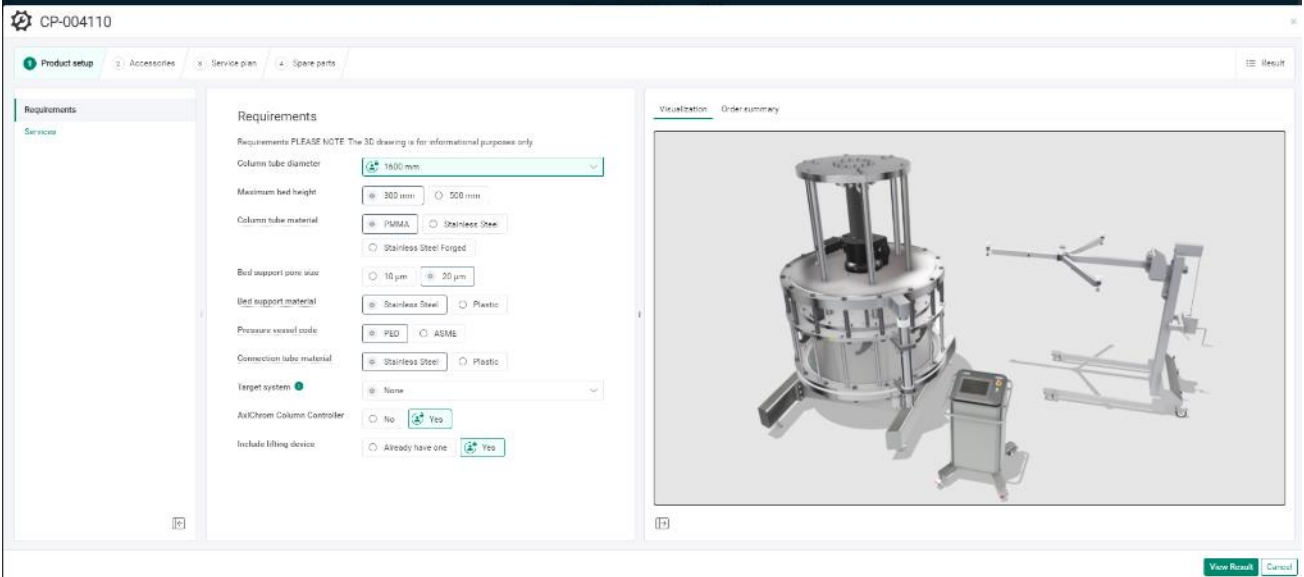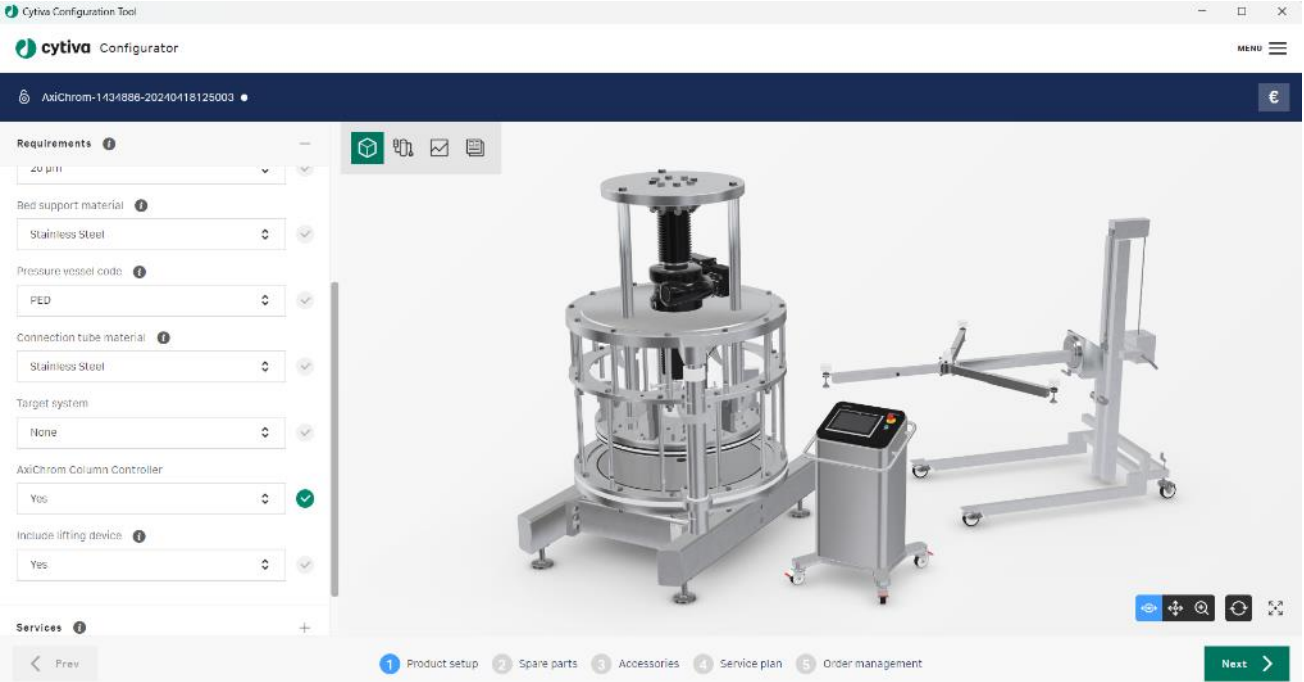customer satisfaction for service

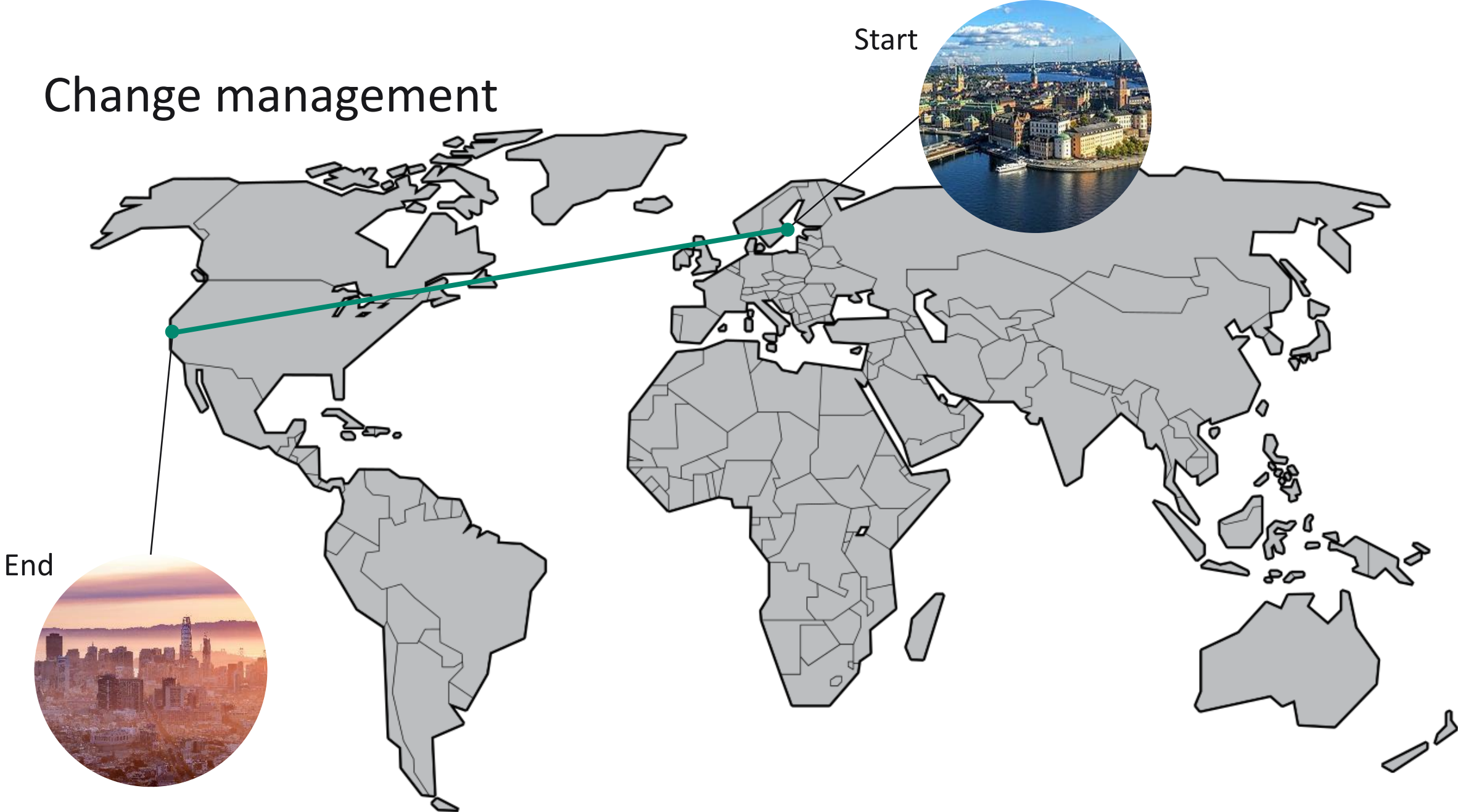**Applying Danaher Business System to continuously improve customer satisfaction**

Why

Challenge

Solution

Change management

Start

End

Building a strong TEAM
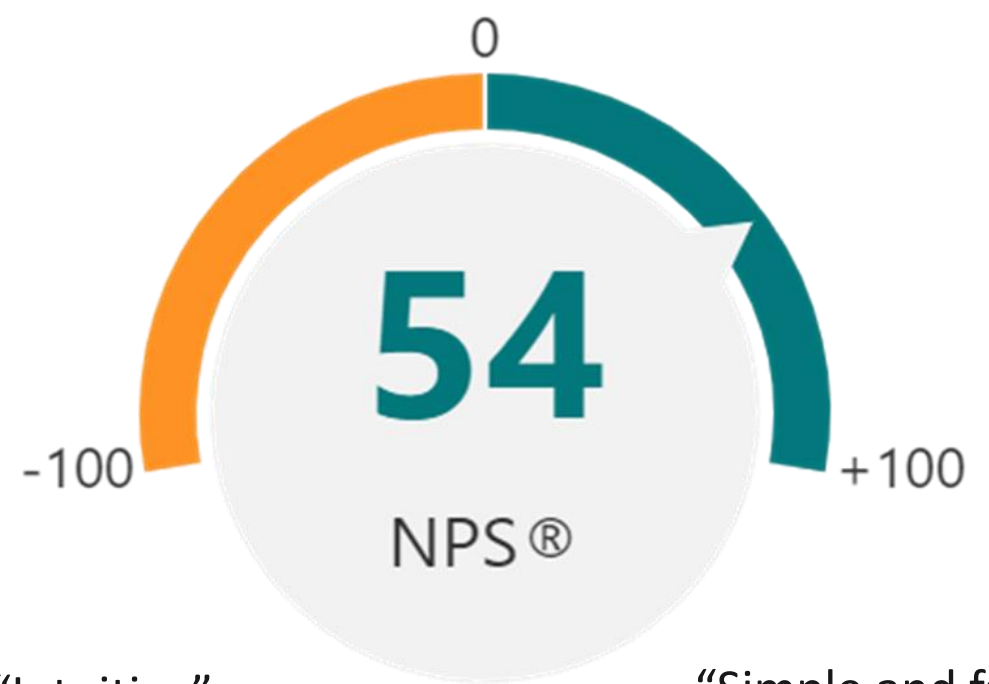

*

It's all about creating a safe space to building knowledge!

* P Runsten, A Werr, Kunskapsintegration: om kollektiv intelligens i organisationer

Success measures

8
maintenance
releases

54
NPS®

-100   +100

"Intuitive"   "Simple and fast"

"Very easy"   "Better 3D quality"   "Very clear"

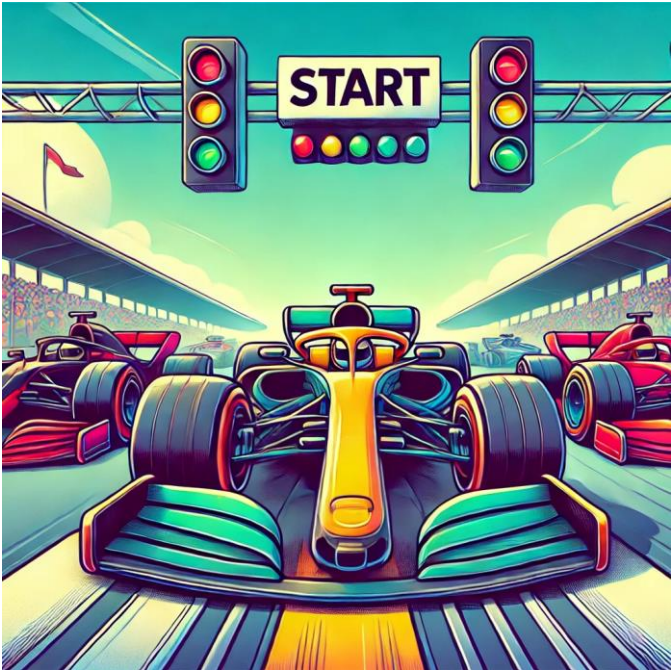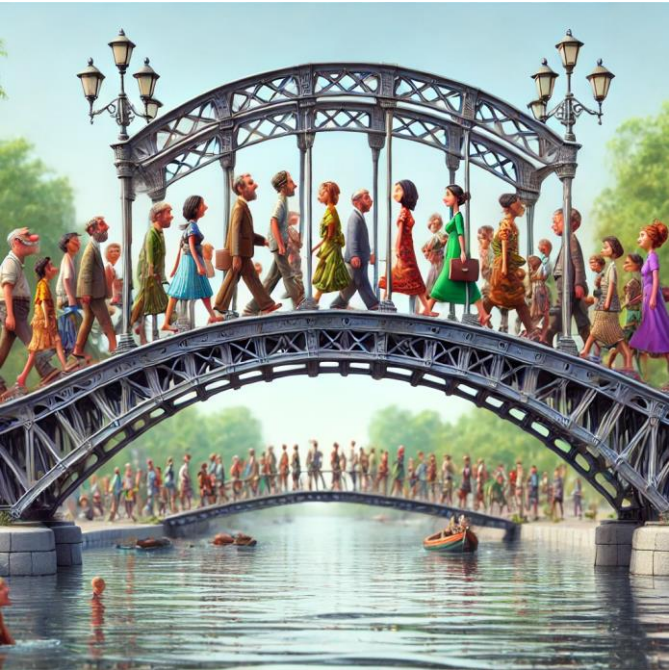"Faster and easy to use"   "Easy to enter data"

"Allowing bundles of products"

"I LOVE that I can do it on my phone or iPad"

"The AR application was highly appreciated"

"The ability to really dive into things (when zooming) is amazing"
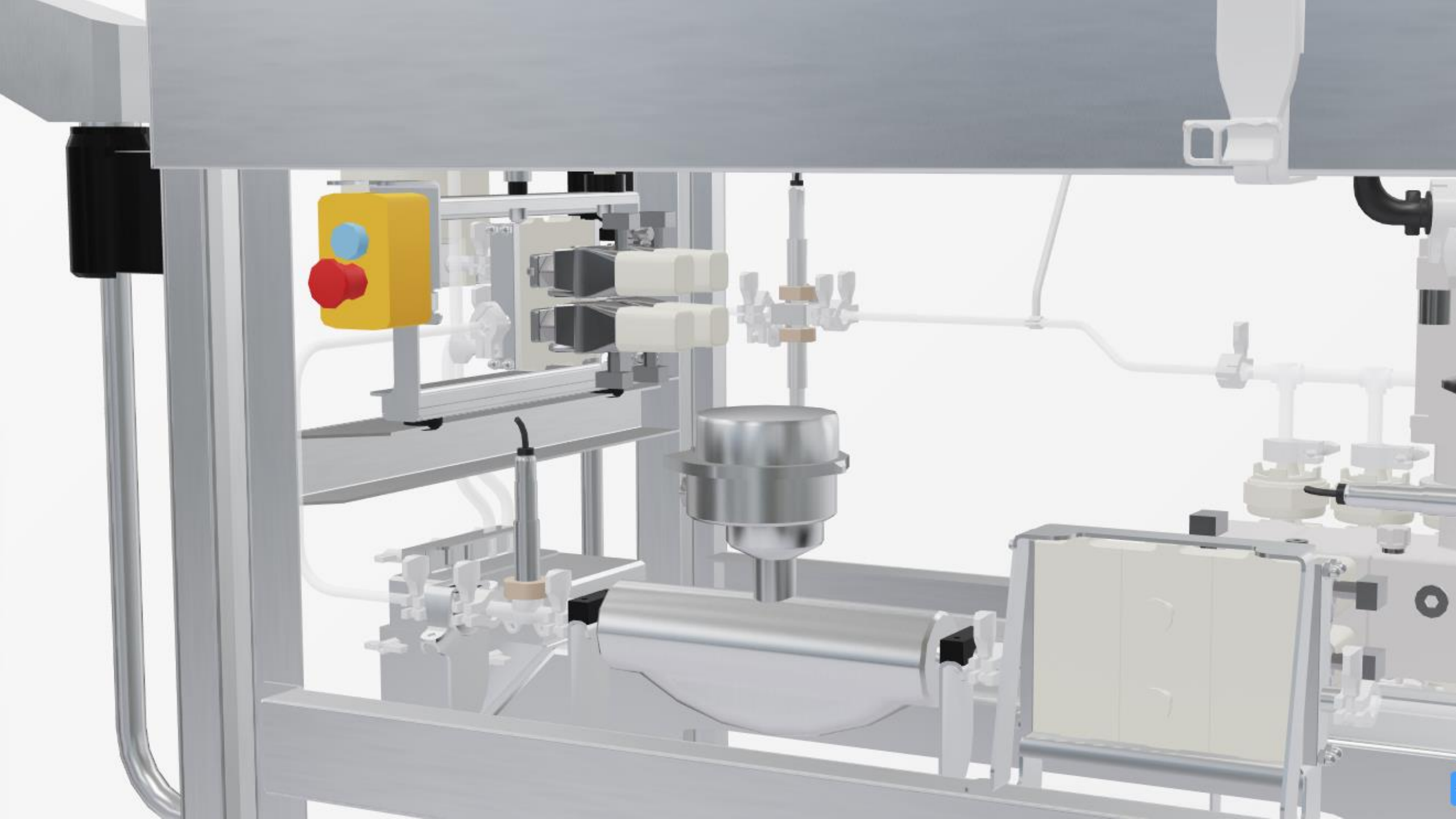
Results

Additional Benefits

Control

Visibility

Empowerment

Structure

Efficiency

What about the visualization?

HS-1
E-Stop

PT-001
Atmospheric pressure

Q&A

tacton
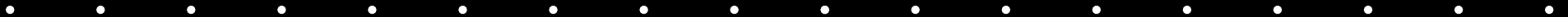
Lunch break until 14:15

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Tacton Summit 2024

Customer Case Metso

Kristian Katilainen, Product Competitiveness Manager Metso

Metso

Implementing new products into TactonCPQ

Kristian Katilainen

October 2024

Kristian Katilainen

- Product Competitiveness Manager
  - Sales process development & support
  - TactonCPQ implementation & maintenance
  - Introducing new products into TactonCPQ
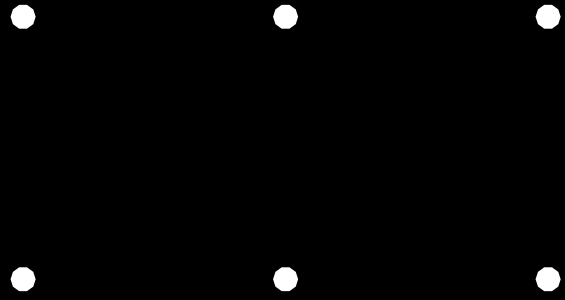
Metso

AGENDA

01 Metso in brief

02 Key elements

03 Project success framework

04 Key learnings

05 Conclusions

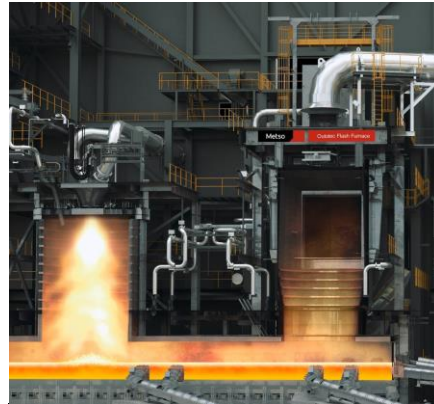**06** Q & A

Metso

01

Metso in brief

Our businesses

Aggregates
Crushing and screening equipment for the production of aggregates

Minerals
Comprehensive solutions for minerals processing, hydrometallurgical recovery and recycling of metals

Metals
Process technologies, solutions, and services for metal and chemical industries

Services
Spare parts, refurbishments and professional services for mining and aggregates customers

Consumables
Comprehensive offering of wear parts for mining and aggregates processes

Metso

Key numbers in 2023

Sales
EUR 5.4 billion

~50 countries

Adjusted EBITA
EUR 887 million
16.5%

17,000+ employees

Planet Positive sales
EUR 1.4 billion

100+ nationalities

Sales by geography
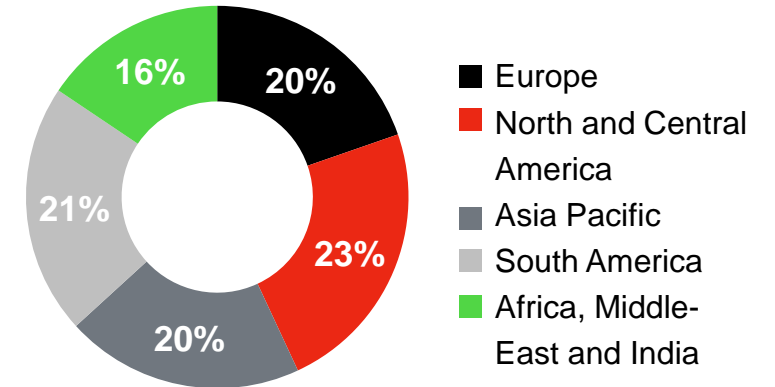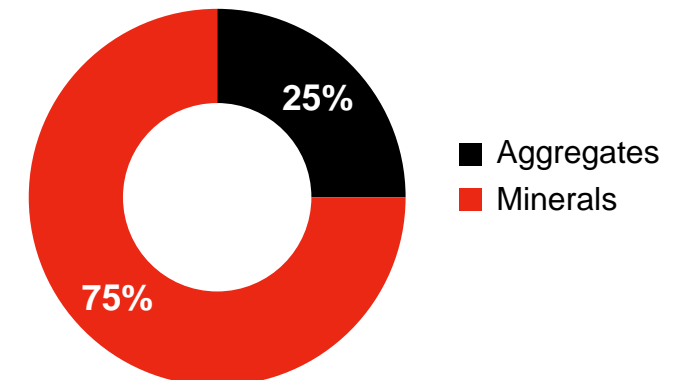
- **20%** Europe
- **23%** North and Central America
- **20%** Asia Pacific
- **21%** South America
- **16%** Africa, Middle-East and India

Sales by segment

- **25%** Aggregates
- **75%** Minerals

Metso

02

Key elements

Implementing new products
into TactonCPQ

Metso

Key Elements

Implementing new products into TactonCPQ

Schedule

Leadership Engagement

Resources

Organizational Change

Product Customization

Product Managers' Involvement

Budget

Product Data Quality

Metso

03

Project success framework

Implementing new products into TactonCPQ

Metso

Project success framework
Key components for ensuring project success

Leadership and team building

Kickoff workshop

Project charter

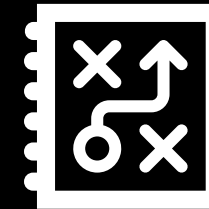Communication framework

Metso

Project success framework

Leadership and team building

Clear objectives and goals	Building a team	Development strategy

Metso

Project success framework
## Leadership and team building

Clear objectives and goals

The most important specification processes

Reviewing RFQ Specification Documents

Pricing the Configuration

Formatting the Quotation

Selecting & Sizing Equipment

Producing Commercial & Technical Data

High-quality Quotation to Customer

Targets

Lead time

Resource consumption

Product offering

Alternative configurations

Sub-category

From customer RFQ until quotation is submitted to be faster

External support specialists for creating proposals less needed

Offered list of parts and ordered list of parts to be more precise

Possibility to manage revisions and alternative configurations more systematically

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Project success framework
Leadership and team building

Building a team

- Product Group Resource
- Business Line Support = Int. Project Manager
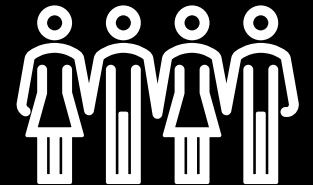- External Project Manager

CPQ FINLAND
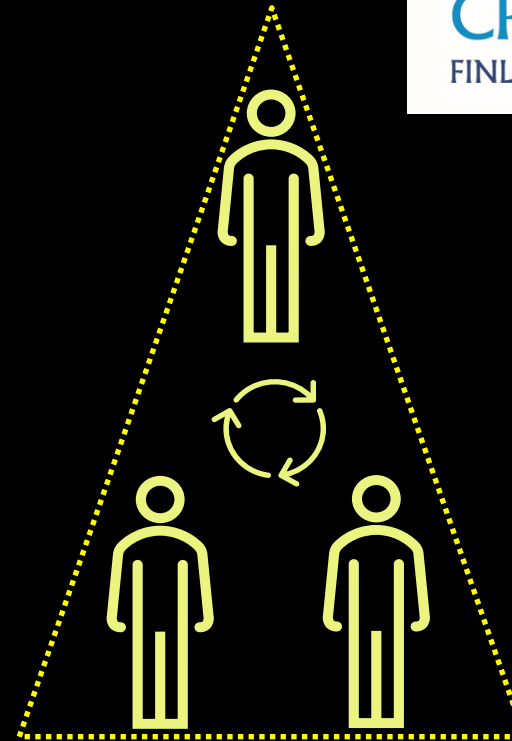
Project Sponsors
- Head of Product Group
- Head of Proposals
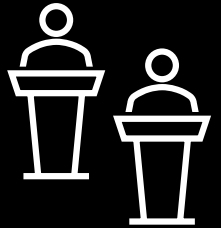
Project Team Members
- Product Managers
- Product Engineers
- Process Engineers

Stakeholders
- Sales / Proposals
- Engineering
- Sourcing
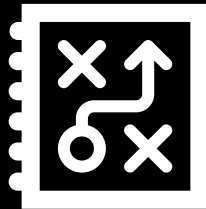- Manufacturing
- Delivery

Metso

Project success framework
Choosing a development strategy

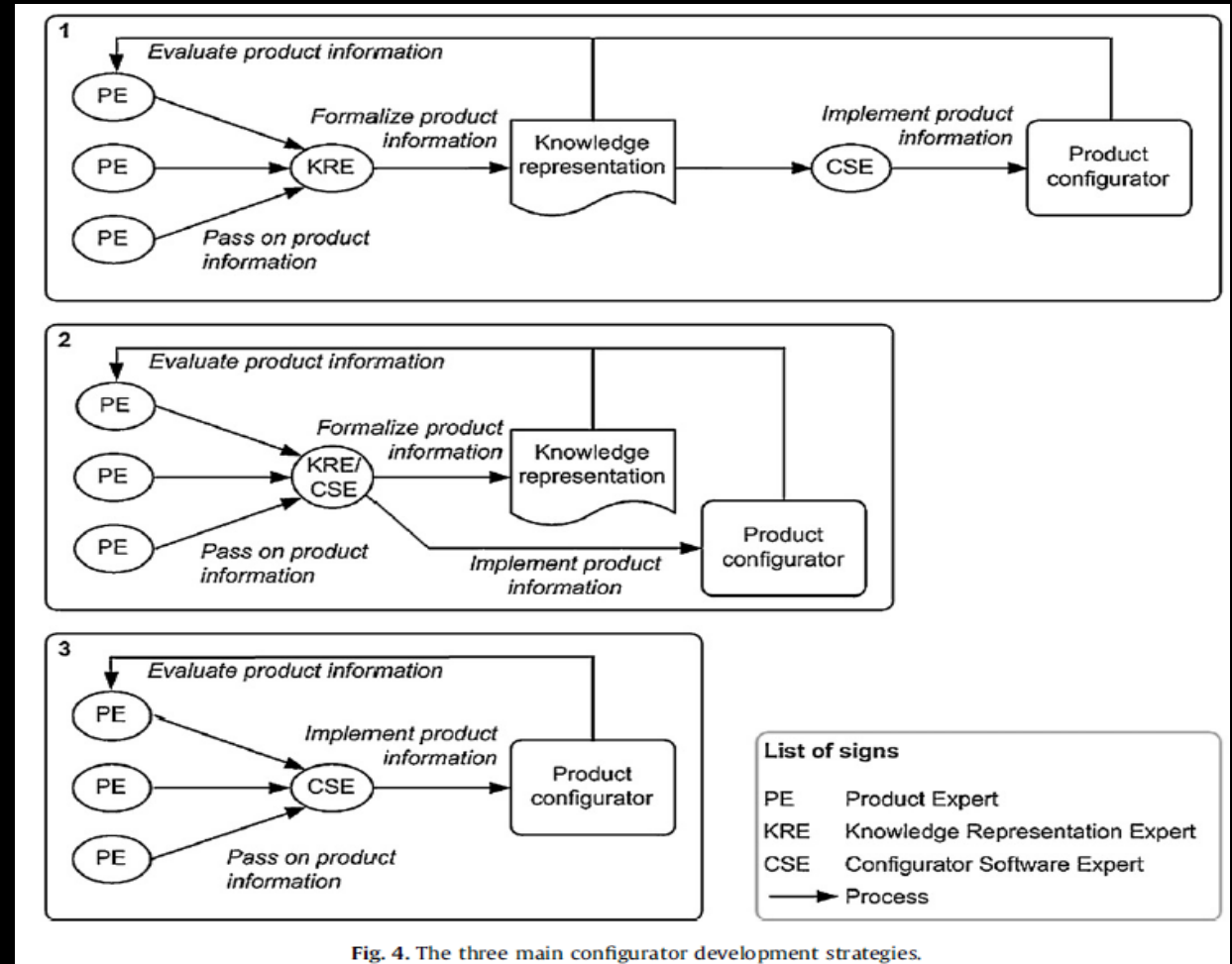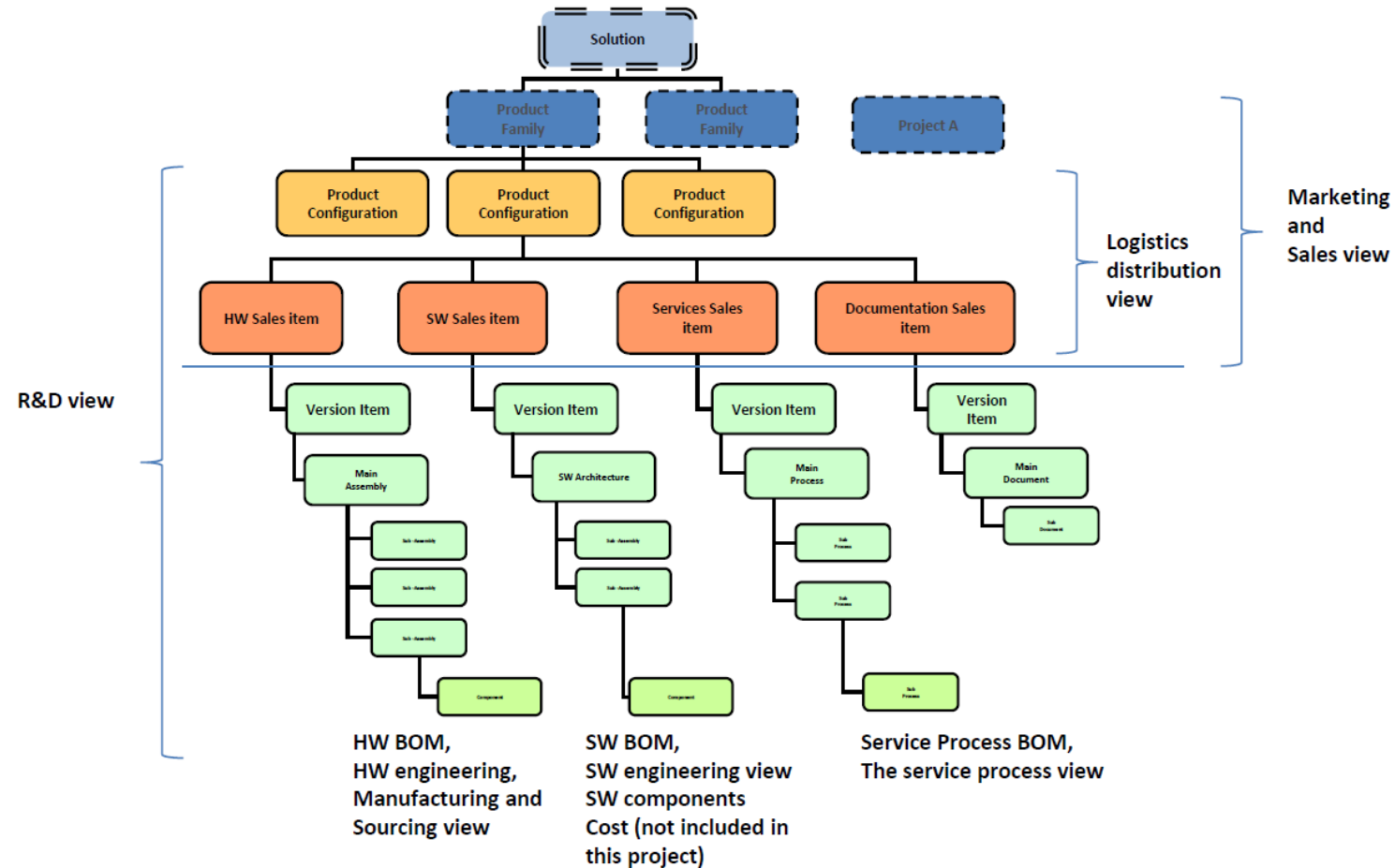Development strategy

Fig. 4. The three main configurator development strategies.

Haug, A., Hvam, L., & Mortensen, N. H. (2012). Definition and evaluation of product configurator development strategies. Computers in Industry, 63(5), 471-481.

Metso

Project success framework

Conducting a succesful and engaging kickoff workshop

- Why?
- What is CPQ?
- Way of Working?

- Stakeholder requirements
- Aligning goals, roles, responsibilities

Harkonen, J. & Mustonen, E. Lecture material II -2020. Course 555343S Product Data and Product Lifecycle Management.

Metso

Project success framework
Creating a project charter for clear insights and updates

Objectives

- ██████████████████████
- ████████████████████
- █████████████████████
- ███████████████████████
- ████████████████████████

Project team

Project lead: ████████████████

Project team: ███████████████████████

Project sponsor

████████████████

Stakeholders

███████████████

Deliverables

Milestones	Epics
M0 Project kick-off	
M1 Modelling start	
M2 Process Calculations "MVP"	
M3 Logical Structure & Sales Items	
M4 Costs & Prices implemented	
M5 Configuration "MVP" implemented	
M6 End user trainings and global roll-out	

Process

tacton

Schedule and milestones

M0 — M1 — M2 — M3 — M4 — M5 — M6

| April | May | June | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar |

2025

- Objectives
- Project team
- Deliverables
- Schedule & milestones

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Project success framework
Establishing a communication framework

Leadership review

Steering Committee meetings

Escalation paths

Project implementation

Conducting modelling and product workshops

Deciding communication channels

Metso

Project success framework
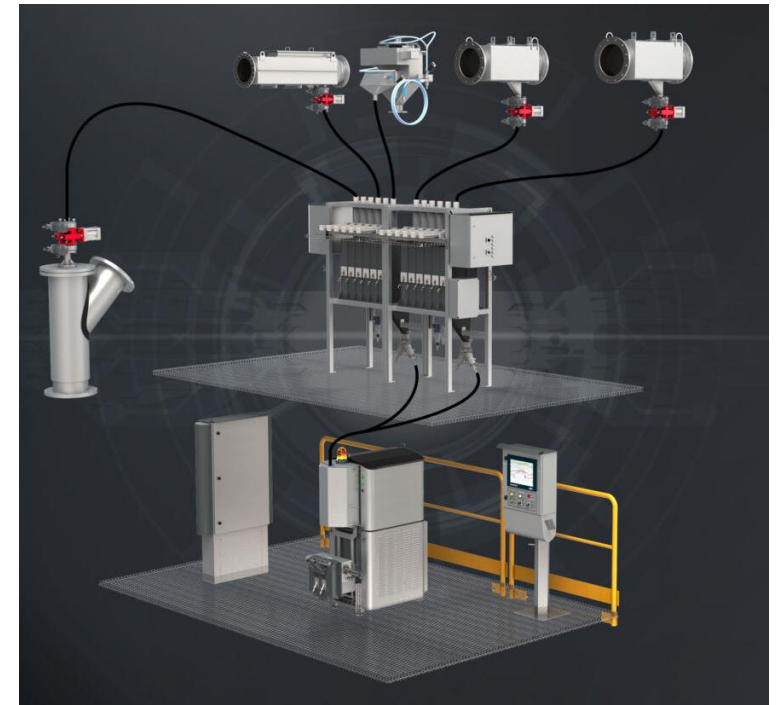
New product introductions into TactonCPQ

TactonCPQ implementation & Pilot product introduction project started in 9/2021

Separation Business Line

- 3 product introductions done (1 pilot project)
- 1 new product introduction ongoing

Others in Metso

- 2 product introductions done
- 4 new product introductions ongoing

Metso

Project success framework
Separation Business Line

Chart: Duration (Months) vs. Product A (Pilot), Product B, Product C

- Red line (Salesforce Integration, TactonCPQ Setup, Tacton Trainings, IT Approval): Product A (Pilot) = 18, Product B = 6, Product C = 4
- Green line (TactonCPQ Skilled Employees): increasing trend

Metso
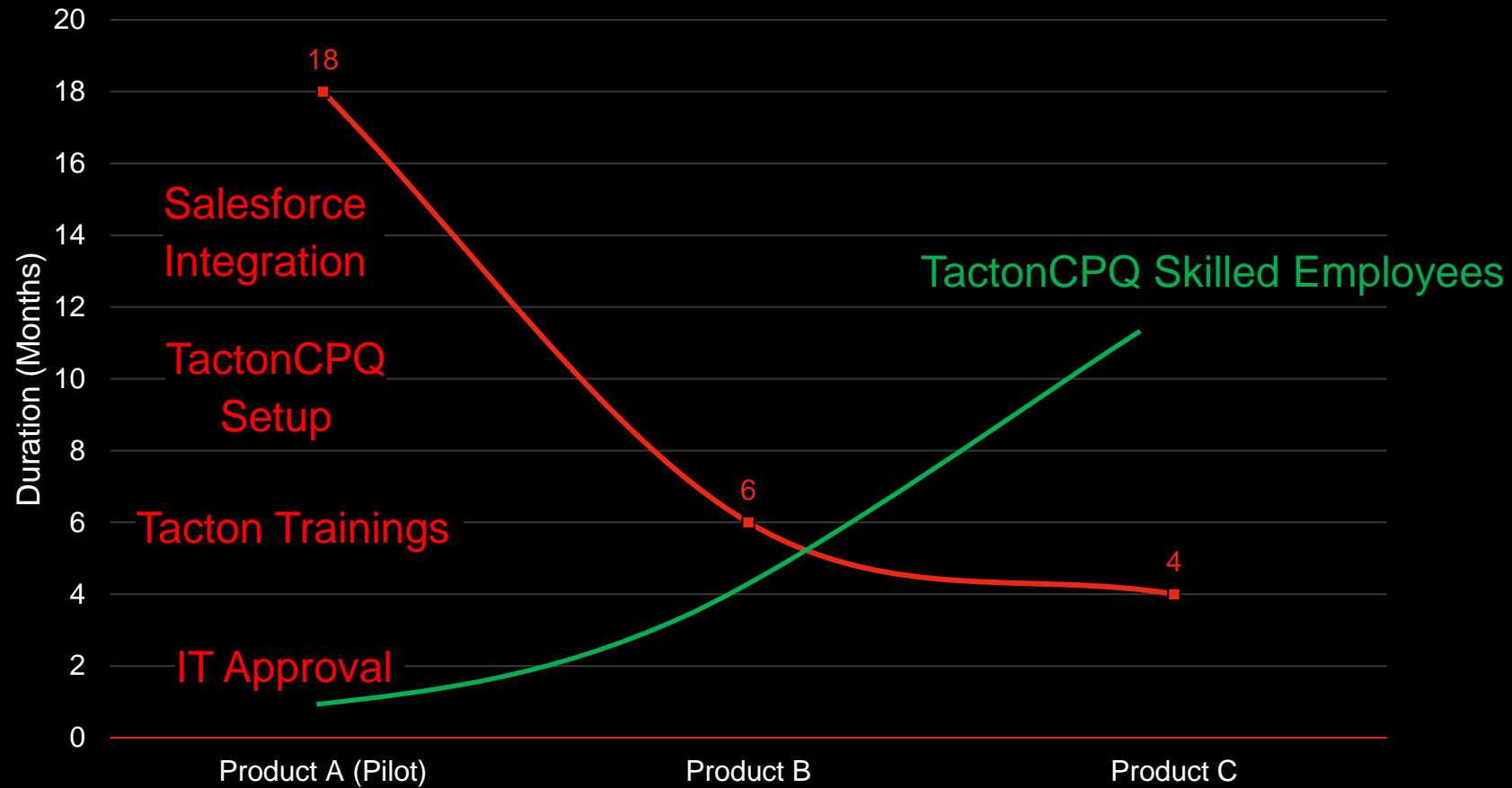
Project success framework
Achievements

- Business growth & performance
  - Sales and profitability increased; quotation volume +20%
- Resource efficiency
  - Proposal Managers' resource use down by 40%
  - Technology Managers: faster scoping with TactonCPQ
  - Product Managers: focus on innovation, less on sales cases
  - Training for new Technology Managers: quicker and easier
- Quality
  - Technology Managers: accurate scoping & pricing
  - Improved information security & IP sharing
- Branding
  - Accurate quotes build trust
  - Customized standard Metso quotes and documents

"Distributed sizing by multiple persons. Previously, sizing was done by one or two persons. High workload occasionally led to backlogs and sizing/quotation delays."

"Conformity in machine selection. No bias by persons."

"Faster turnaround for quotations due to the automated sizing, configuration and quotation process."

RESTRICTED   October 14, 2024

Proposal Managers = Sales Support
Technology Managers = Sales Reps with technical expertise

Metso

04

Key learnings

Implementing new products into TactonCPQ

Metso

Key learnings

Implementing new products into TactonCPQ

Include an external consultant

Engage all relevant stakeholders

Simplify communication with external parties

Escalate unresolved challenges
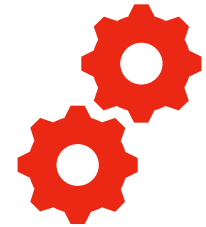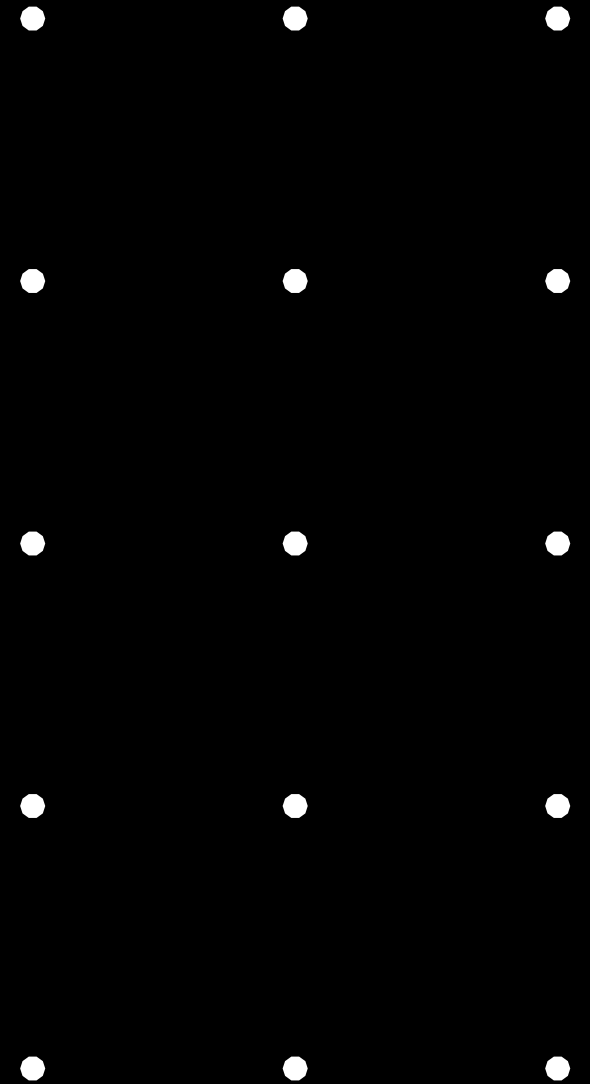
Use an iterative development process

Metso

05

Conclusions

Implementing new products
into TactonCPQ

Metso

Conclusions

Overcome complex challenges and ensure project success

- Leadership engagement
- Collaboration and communication
- Managing organizational change
- Quality data
- Learning from experience

Metso

Q&A

Kristian Katilainen
Product Competitiveness Manager | M.Sc. in IEM

Tacton Summit 2024

Customer Case Bromma

Ingemar Lindström, Digital Transformation Lead Bromma
Joakim Heijbel, Director Digitalization and Sustainability Bromma

Bromma

Leveraging CPQ Data for Business Intelligence

Kalmar moves goods in critical supply chains around the world.

Making every move count.

Kalmar

Shaping the industry and making every move count

Strong track-record of sustainable innovations and transformation

1940s

First steps

Combining portfolio of leading businesses

Part of Cargotec 2005-2024
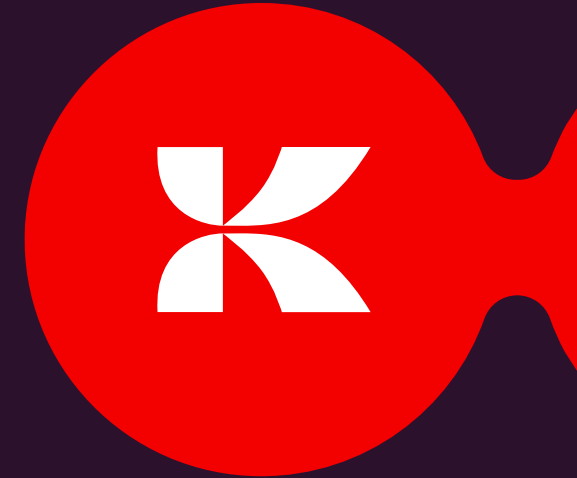
Independent Kalmar

Kalmar

We are a 1.5°C company

Why we act on climate change:

→ It's where our biggest negative impacts lie.

→ It's also where our offering can be part of the solution.

→ We see real business opportunities in developing zero and low-emission products and services.

→ We need to help mitigate climate change and secure our own competitive advantage in the long run.

Predicted global temperature increase by 2100

+5°C

+4°C

2100 with current policies*
+2.1-3.9°C

+3°C

+2°C

+1°C

2100 goal
Keep below 1.5°C

+0°C

Global mean temperature increase by 2100

We are here 2021
+1.2°C
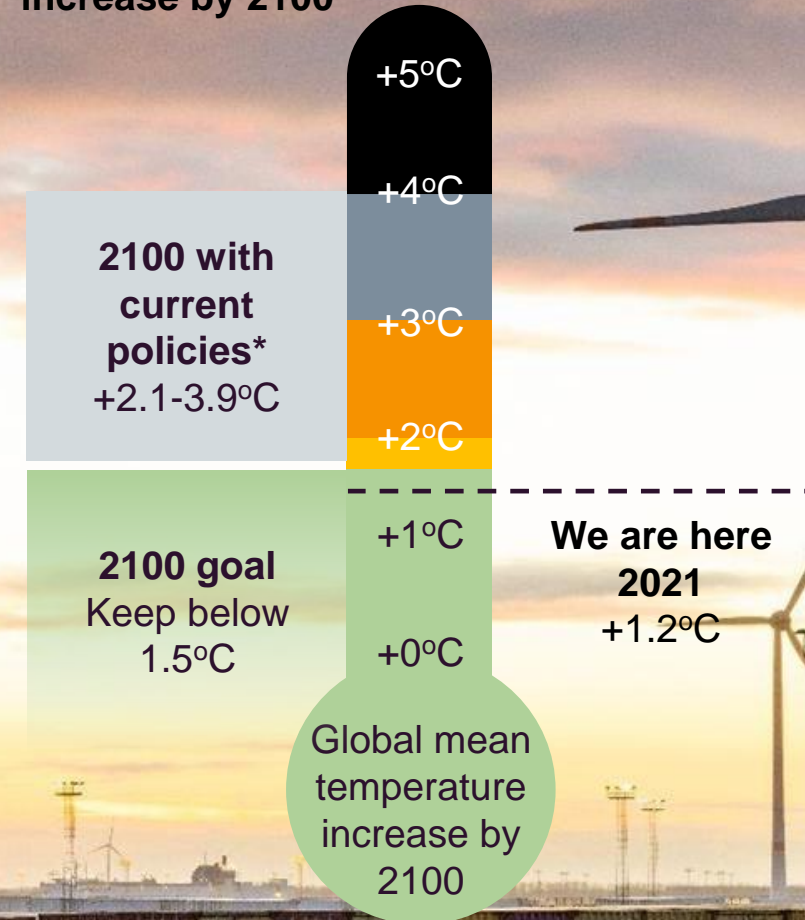
* Projected temperature increase under current international policies
Source: Climateactiontracker.org

SCIENCE BASED TARGETS
DRIVING AMBITIOUS CORPORATE CLIMATE ACTION

Kalmar

Bromma TODAY

- Over 20,000 spreaders delivered
- Spreaders are in use in 99 out of the top 100 ports worldwide
- Headquarters in Singapore
- Spreader production is located in Ipoh, Malaysia
- Global sales & service network in 40 countries

➔ **The container: highly standardised**

➔ **The spreader: highly customised with modular design**

- Crane and headblock design

- Customer requirements

- Working condition

- Options and accessories

Bromma and Tacton

TC site implemented

2012

BROMMA

Bromma and Tacton

TC site implemented

2012

Full product scope

2018

BROMMA

Bromma and Tacton

TC site implemented

2012

Full product scope

2018

CPQ upgrade

2023

BROMMA

Bromma and Tacton

TC site implemented

2012

Full product scope

2018

CPQ upgrade

2023

Data and Analytics

2024 ⋯→

BROMMA

Overall Architecture
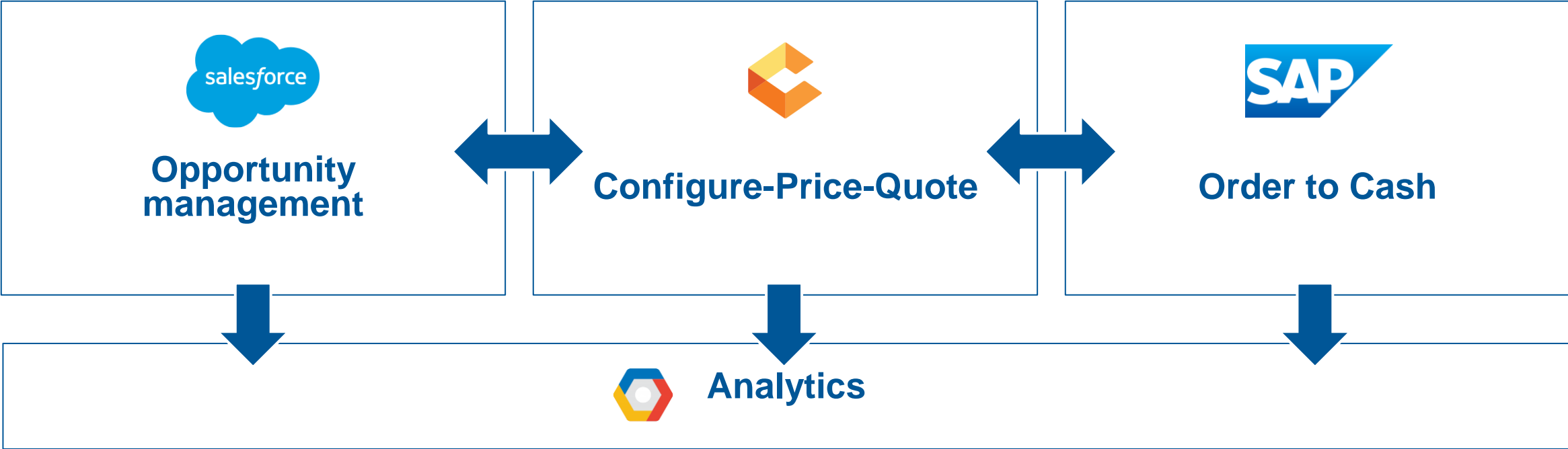
Data and Analytics Architecture
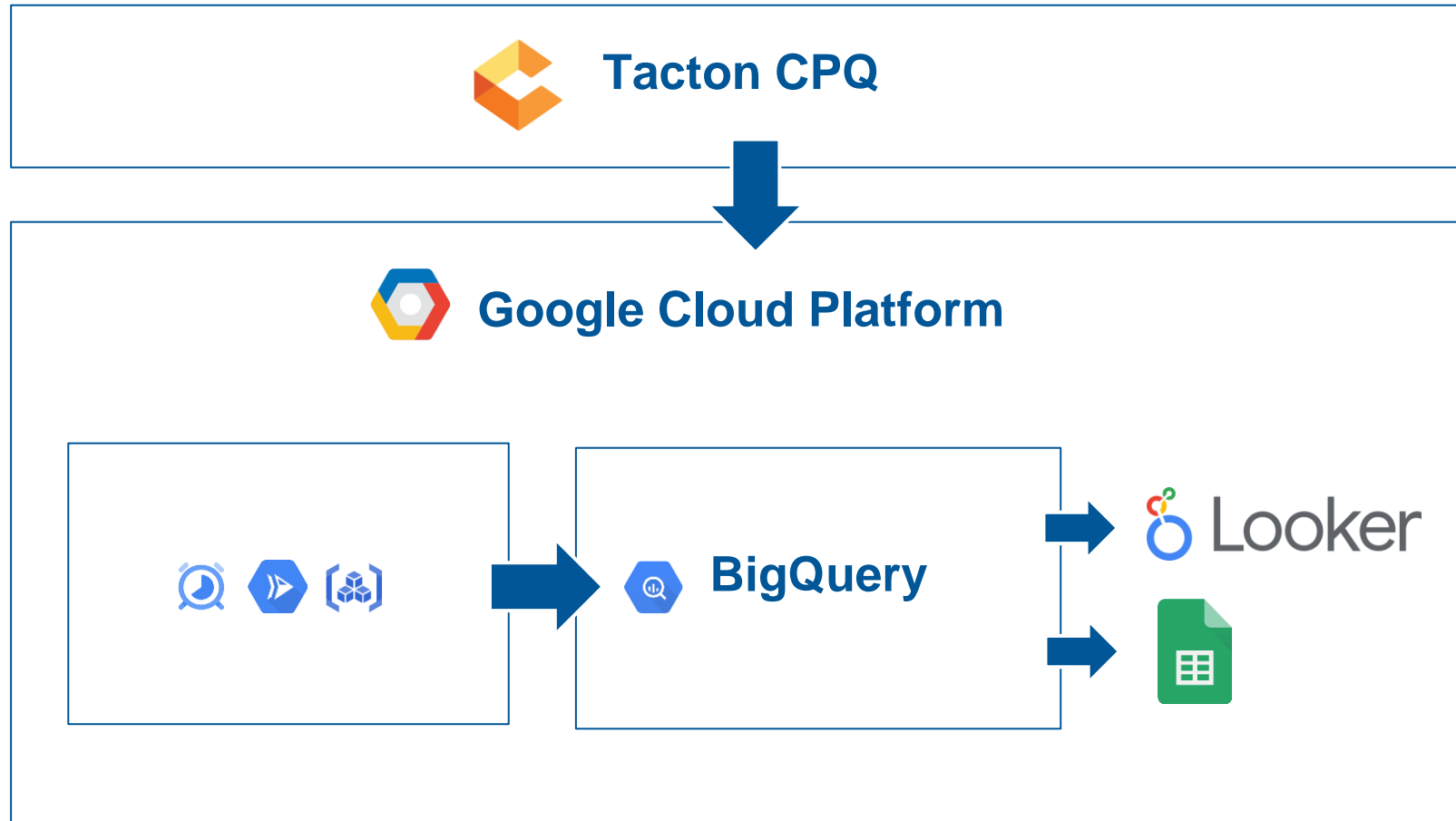
General Product Configuration & Pricing Insights

What are the most frequently quoted product options and option combinations?

Which products and options are driving the highest margins?

Are there options that are frequently quoted but rarely ordered?

Are there options that are never quoted, and should they be reconsidered in our product offering?

Are there significant regional differences in configuration preferences?

Are customers requesting similar customizations in specific product lines, indicating a trend or demand shift?

Which custom (ETO) requests are the most frequent, and are they candidates for standardization?

BROMMA

Looker studio reports and Dashboards

Total Order Value per Region (sold-to) (EUR)
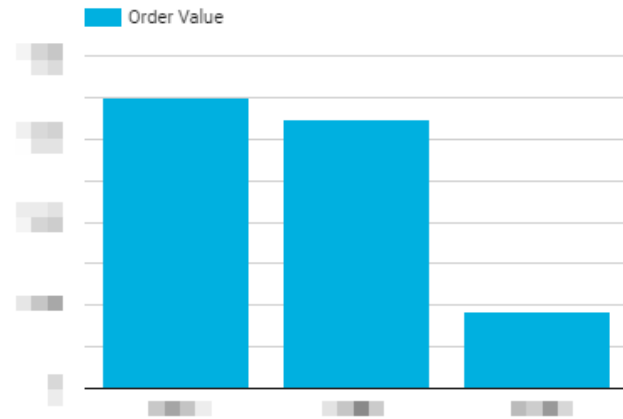
Units Ordered per Product
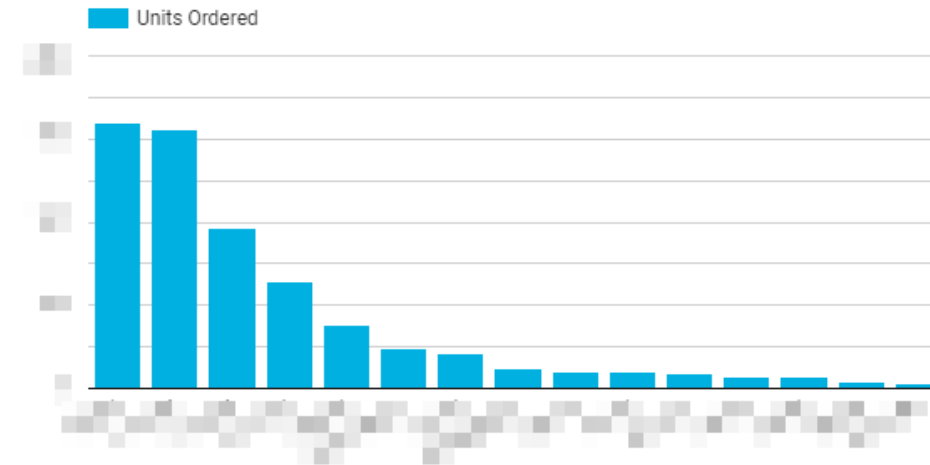
Total Order Value per Region (end customer) (EUR)
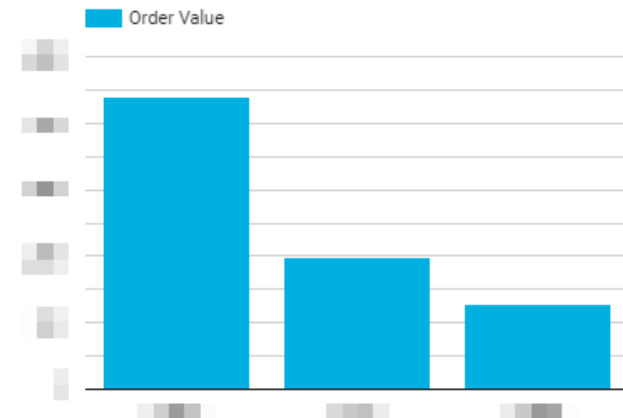
Order Value per Sales Channel

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102
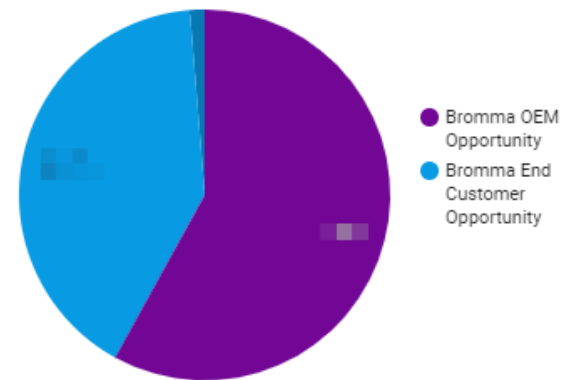
Google Connected Sheets

Custom BigQuery Queries

Tracking & Forecasting Eco Portfolio Sales

In order to develop our product portfolio we have a classification "Eco Portfolio", which refers to products or services that are aligned with the EU Taxonomy's definition of a sustainable activity

Accurate reporting on our Eco Portfolio is essential for both top management and public market disclosures

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**Track Eco
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Monitor & report progress towards sustainability targets

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Track Eco Portfolio sales on a daily basis	**Accurate sales forecasts for Eco Portfolio**	**Monitor & report progress towards sustainability targets**	**Better understand how much of a premium customers are willing to pay**

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Tracking Roll-out of 6th Generation Control System

The control system is a critical part of our products

We have recently launched the sixth generation control system

For the product managers, it is essential that to track the roll-out of the new control system, how much it is quoted and in what volumes it is ordered

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| Monitor the quoting frequency | Track conversion rate across different regions and customer segments | Analyze if the new control system is correctly priced | Identify where the first batches of the new control system are being delivered |

Pilot: Forecasting Long Lead Time Components

Certain components have a long lead time from our suppliers

Today the sourcing team lacks visibility into what components are in the sales pipeline until they are actually ordered

In the worst case, our lead times are extended due to long lead times from our suppliers

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Generate reports on long lead time components in the sales pipeline	**Use forecast from CPQ to proactively order long lead time items from suppliers**	**Shorten delivery lead times for our customers**	**Improve Supplier Relationships**

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In summary

➔ Tacton CPQ and GCP is allowing us to take new steps in Analytics

➔ We are getting better access to standard information such as pricing, margins, configurations, volumes

➔ Most importantly we now have the capability to develop custom analyses with limited effort

BROMMA

A Tradition of Innovation

BROMMA

A Tradition of Innovation

Q&A

tacton

Tacton Summit 2024