

CONFIGURATOR CONCEPTS

A configurator is a rule based software application designed to assist a user in specifying and choosing a product by selecting general needs and requirements. Configurators are ideal for complex products and services. Especially those with numerous options and accessories, some of which may be mutually exclusive.

Even though the configurator experience is relatively unstructured, it efficiently “guides” the user through the selection process. The user can specify requirements and make selections in any sequence. As the selections are made, rules and constraints are applied in real time to ensure that the configured product is valid.

After the selection process, the configurator can generate all pertinent product information including: specifications, prices, quotations, proposals and submittals. Depending on the complexity of the product and customer needs, configurators can be implemented to also generate installation/assembly instructions, user manuals, CAD drawings and literature. In addition, configurators may also generate specific market, contract, discount, and special pricing.

Today many configurators can also generate bills of materials and associated documentation. This information can be integrated with other systems including Enterprise Resource Planning (ERP), Customer Relationship Management (CRM), and Sales Force Automation (SFA).

In the past configurators have been available for “internal use” in companies by highly trained personnel. The newest configurators being implemented on-line are “customer focused.” Now internal departments, the sales force, service personnel, distributors, channel participants and end user customers are using configurators. Today’s configurators are developed first and foremost to improve the ease of doing business for the supplier, channels and customers.

Primary customer benefits include:

- No need to be an expert on the supplier’s products
- Easy order placement convenience
- Instant information

Primary supplier benefits include:

- Increased customer satisfaction and loyalty
- Improved time to market
- Shorter sales cycle
- Increased sales
- Reduced costs