

# The Ultimate Guide to CAD Automation

Automate your manufacturing sales  
processes to lead to more innovation



[www.tacton.com](http://www.tacton.com)



# A Quick Intro

Every manufacturer knows that the race to reinvent how they do business has been ongoing for years. In the past companies have received interest in their products from customers but have run into time-consuming issues that slow down the sales process and creates a disjointed buying experience for your customers.

As deals become more and more complex, customers often require detailed technical CAD drawings to close a sale. As you have experienced, a configuration often changes throughout the selling process, meaning new technical drawings need to be created each time. This type of task can become a bottleneck for both your sales process and engineering resources.

This lengthy back and forth between sales and engineering creates silos, prolongs the sales cycle, slows innovation, and ultimately hurts your customer experience.

Imagine for a minute if you could automate these manual and administrative tasks while speeding up your sales. Sounds pretty good, doesn't it? It's possible with CAD Automation.

So, What is CAD Automation?





# What is CAD Automation?

CAD Automation allows end-users in direct sales to generate CAD documents (3D models and drawings) based on product configurations. This adds value by promoting innovation for your engineers while helping your sales team provide accurate product drawings.

When CAD Automation is integrated with your Configure, Price, Quote (CPQ) solution, you can deliver custom CAD drawings in moments directly from a configured product.

This empowers your sales teams and customers to generate 2D and 3D technical drawings without the need to involve engineers. This ensures your sales reps sell faster and more efficiently while your engineers are freed up to focus on what they do best; innovate.

So, Why CAD Automation?

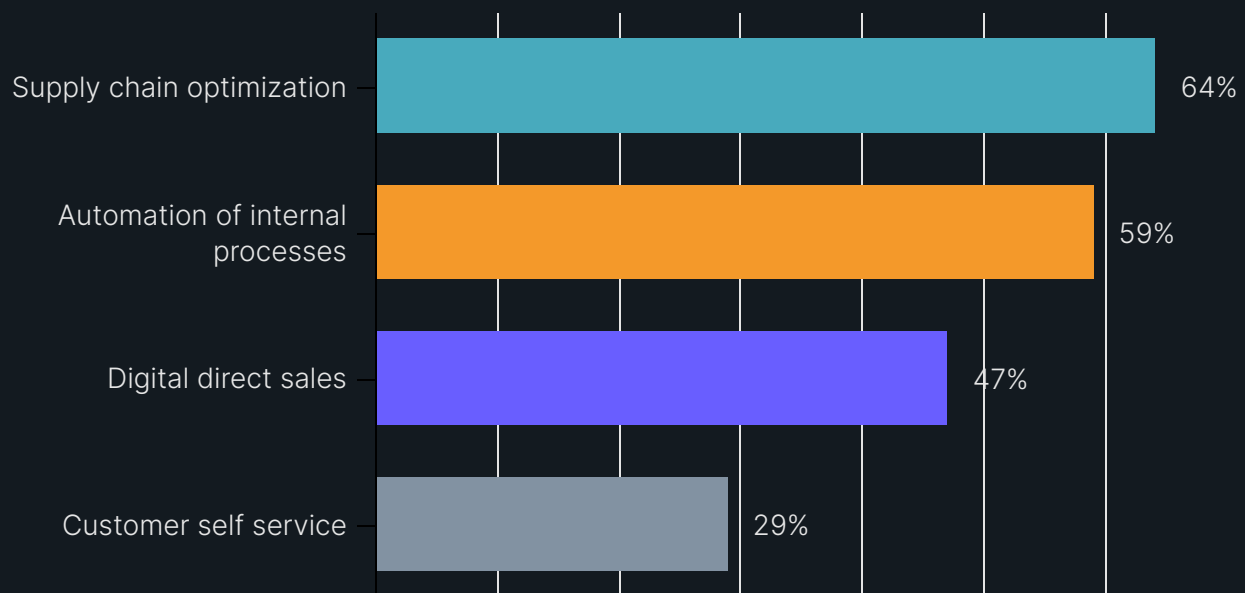




# Automation is a top investment area in manufacturing

Automation is a top priority in the race to reimagine manufacturing in the wake of the COVID-19 Pandemic. At Tacton, we recently surveyed 105 manufacturing companies and found some statistics that drive home the prioritization of automation for manufacturing.

## Most important investment initiatives during current economic uncertainty



With over 50% of respondents noting the importance of automation it's time to take into consideration what solutions will enable automation. CAD Automation won't just help the drive for digitalization but will also enable digital direct sales, and customer self-service by providing CAD drawings to existing customers, or even online prospects.





# What are some common issues without CAD Automation?

**Giving your sales and engineering teams CAD Automation software can be a key component of an exciting and streamlined sales journey.**

Picture this: you've got a new prospect on the phone to discuss your product, the deal is going well, and the prospect chooses your business to manufacture their product. As your sales team gets more in-depth with the customer requirements, they begin the process of going back and forth with your engineering team to figure out what is technically possible. This is where issues tend to arise.

Creating custom sales quotes with technical drawings takes a lot of time. Without CAD Automation your sales team can promise something that may not be technically feasible. This causes a headache for your sales team and sends your engineering team scrambling to provide other options which may not be to the exact specification of the customer. All this is happening while your customer is contemplating what's taking so long and considering other buying options.

This obviously creates frustration internally, and even more for your customers. As they go through the sales process, your customers may even require the technical drawings before making a purchase. When CPQ is integrated with CAD systems, you alleviate that internal stress while ensuring your customers are happy with their experience.





# How do CPQ and CAD automation work together?

Configure, Price Quote (CPQ) software is another solution that's often used with CAD automation. CPQ accelerates sales and delivers an enhanced customer experience enabling them to buy across all channels. CAD and CPQ working together can be the difference in winning and losing deals. So how do they work together?

CPQ software and CAD automation work together by providing knowledge from your engineering team to your sales without having to go through constant meetings and emails. This happens by codeveloping product logic between your engineers and CPQ with a solver engine.

This enables your sales rep to sell what your engineers can create because it was co-developed with your engineering team. This enables your sales rep to sell what your engineers can create because it was co-developed with your engineering team. Eliminating guesswork.

By paring CPQ with CAD Automation, you're insuring your sales process is automated and your resources are freed to do what they do best; deliver for your customers.

## Features and Benefits



Dynamically update 3D CAD models with every choice made in the configuration



Empower customers and sales reps without CAD skills to generate accurate technical drawings



Eliminate error-prone manual handovers across your teams



Empower engineers to focus on innovation, new products and value creating tasks



# How can CPQ with CAD Automation help manufacturers?

## **Sell highly configurable manufacturing products with ease and confidence**

Let's face it, product portfolios are large and with so many options can be confusing to not only your newest sales rep but even your more senior reps. When CPQ is paired with CAD automation your sales reps are equipped with approval drawings, and visual documentation that supports the final product your customer will buy. This enables quick and accurate product drawings to be done with accuracy and confidence. Giving your newest sales rep the same knowledge as experienced ones will enable them to onboard faster, intrigue customers, and ultimately sell products with ease.

## **Accelerate sales with automation**

Selling manufacturing products can be a long process and finding ways to accelerate the sale can be a key driver of winning deals. With CPQ and CAD automation, your sales rep won't have to worry about costly mistakes because the product logic is accurate. Without these mistakes, it's possible to avoid delays, returns, and discounts. This autonomy of your sales team also enables your engineering team to do more.

## **Enable your engineers to focus on innovation**

Without your engineering team having to be involved in every sales case and administrative tasks they can focus on new product features and development. This can help your company find new ways to sell to new or existing customers.

## **Create an exciting and engaging customer experience**

Customers don't want to wait anymore for the slow back and forth just to produce CAD drawings. They want to see visualizations of their products in their real environments where they will be used. CAD and 3D visualizations work together to ensure a great customer experience. It's even possible to get more technical with shop drawings, BoMs, and analytics.



# CPQ with CAD Automation solves a variety of challenges

| Challenge   | Solution  |
|---|---|
| Mass customization requires sales engineering in every sales process. Sales cycles are long and cost per quote is spiraling | Provide accurate CAD data for every product configuration proposed to end-customers as fast and easy as possible with CPQ and CAD Automation  |
| Manual handovers lead to a slow and inefficient quotation process that prolongs the sales cycle                             | Simplify and automate handover processes between customers, sales, engineering, and factory   |
| Sales engineering needs to be involved in every sales case to provide detailed technical drawings to close a sale           | Automatically generate reliable technical CAD drawings in real-time without needing CAD skills or engineering   |
| Misunderstandings and lack of technical product knowledge are leading to invalid quote requests                             | CAD files align expectations between you, your customer and your supply chain. The models can be updated with every choice that is made in the sales configurator, bridging the gap between customer requirement and engineering. |
| Lack of single source of product data   | CPQ with CAD automation ensures everyone operates on the same data from customer through the factory  |
| An inefficient and error-prone design process that requires too much administrative engineering work                        | Automate manual processes and empower engineers to focus on innovation, new products, and value-creating tasks  |







# Where to next?

Tacton CPQ with CAD automation solves problems by standardizing and automating the design process that enables your sales team to move faster, and give your engineers more time to focus on innovation. This is work that would directly affect the growth of the business and the bottom-line profit. CAD Automation will reduce costs for your business because it helps reduce common costly mistakes and errors. The automated process assures an even quality of the work performed, no matter how skilled, experienced, or attentive the engineer is, so it will reduce the claims costs as well.

With over 20 years of experience with helping manufacturers automate their processes, we've gained valuable integrations with commonly used CAD solutions such as SolidWorks, Autodesk Inventor, and PTC Creo.

Just like machines revolutionized the manufacturing industry by automating manual labor, CAD automation will revolutionize your design process by freeing up time for your design engineers and make them reach their full potential. Your business will be more cost-efficient, and more innovative.

If you're ready to take the next step with Tacton schedule a demo with our product experts.

Learn more today by visiting [www.tacton.com](http://www.tacton.com) or scheduling your [personalized demo](#).

