



Suhas Bhairav

AI Sales Pricing Calculator Custom Quote Flow

Automate fast, accurate quotes from software requirements.

Turn complex custom software needs into fast, auditable quotes with AI-assisted pricing.

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AI-Driven Quote Flow

This page defines what to automate in the pricing flow and what requires human review. It aligns AI capabilities with pricing complexity and governance.

Key move Start with 5 common requirements mapped to tiers; monitor variance for 14 days.

PRACTICAL CHECKLIST

- 01** Automate: map customer requirements to product bundles, features, and license counts using AI.
- 02** Automate: generate tiered price quotes using pricing charts, discounts, and contract terms.
- 03** Human-in-the-loop: require sales approval for outlier configurations or large discounts.
- 04** Data inputs: capture requirements, customer segment, region, ARR, license term.
- 05** Outputs: quote draft, recommended tier, visible margins, SLA terms.
- 06** Tools: internal pricing engine, AI models (Claude/ChatGPT), data sources (CRM, ERP).
- 07** Guardrails: policy constraints on discounts, approval thresholds, and data privacy.

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Data, Tools, Roles

Identify data sources (CRM, pricing tables, contract terms) and the AI tools (LLMs, orchestrators). Define roles and approvals to ensure accountability.

Key move Establish a weekly data quality checkpoint to catch mispricing early.

PRACTICAL CHECKLIST

- 01** Data inputs: customer requirements, segment, region, example use cases.
- 02** Pricing sources: tier charts, discounts matrix, renewal terms, volume-based pricing.
- 03** AI tooling: LLM prompts, embedding for similarity, rule engine, calculator module.
- 04** Human review: auto-flag high-risk configurations for quote supervisor.
- 05** Outputs: draft quote, recommended tier, discount guidance, margins, terms.
- 06** Access & security: role-based access, data masking, audit trail.

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Adoption Plan & KPIs

Outline adoption steps in four weekly sprints with success metrics and review gates. Assign ownership for data, prompts, approvals, and dashboards to ensure continuity.

Key move Define owners for data, prompts, approvals, and dashboards—clear accountability avoids drift.

PRACTICAL CHECKLIST

- 01** Week 1: inventory current quotes and pricing charts; map top 5 use cases.
- 02** Week 2: pilot automation for a narrow product set with guardrails and approvals.
- 03** Week 3: integrate CRM, pricing engine, and discount rules; test end-to-end flow.
- 04** Week 4: finalize governance, audit logs, and performance dashboards.
- 05** Data governance: ensure PII masking, access controls, and retention policies.
- 06** Metrics: time-to-quote, quote accuracy, win rate impact, discount compliance, margin.

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ABOUT THE CREATOR

Suhas Bhairav

I build AI systems that combine distributed architecture, retrieval, knowledge graphs, security, and practical workflow design. My focus is AI that can be used repeatedly by real teams: understandable, reliable, and grounded in the work people already do.

EXPERTISE

- Principal systems architecture and applied AI engineering
- Production-grade AI systems, agentic workflows, RAG, and knowledge graphs
- Full-stack workflow applications across AWS, Google Cloud, Azure, on-premise, and hybrid environments
- Practical AI implementation patterns for automotive, manufacturing, finance, logistics, cybersecurity, sales, and customer operations
- Security, governance, observability, approvals, and failure-mode thinking for operational AI systems

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