

From product selection to a clear sales enquiry

When a 3D configurator makes sense, how to prepare for it and what your sales team needs to make it useful.

3D CONFIGURATOR / YOUR CUSTOM PRODUCT



3D product preview

Customise your product

DIMENSIONS

Width

4.00 m

Depth

3.00 m

FRAME COLOUR



Anthracite

LED lighting



Side shading



Illustrative treede interface; example values. Product visualisation: MojaPergola.sk.

Who this guide is for

For business owners, sales leaders and marketing managers who sell products with multiple dimensions, variants and accessories and want to make choosing easier for their customers.

What you will learn

Product suitability · customer choices · sales and CRM · preparation
Implementation and support · measuring value · getting started

01 / WHEN A CONFIGURATOR MAKES SENSE

Start with the problem you want to solve.

A configurator should help customers make a specific decision or help salespeople complete a specific task. This is a useful starting point for defining the project.

Where does your sales process take longer than it needs to?

Follow a typical enquiry from first contact to quotation. If your team repeatedly asks for dimensions, explains the same options or sends photographs of individual accessories, customers may be able to do some of this work as they explore the product. The salesperson can then build on a clearer idea of what they want.

A good starting point	What to check in your business
Recurring product choices	Can you define the models, dimensions, materials and accessories that recur across orders?
Visual differences influence the decision	Do customers need to see how individual choices affect the finished product?
Rules can be defined	Can you specify valid combinations and the limits beyond which a technical specialist must review the enquiry?
Enquiries can be handled	Is someone responsible for replying and arranging the next step?

When it is better to start small

If every order is entirely different, manufacturing rules change frequently or site conditions determine the solution, start with a simpler product range. For more complex cases, the configuration can provide a starting point for a consultation; your team validates the final solution.

A question to start with

What should customers know after using the configurator, and which details should salespeople no longer need to establish from scratch?

02 / THE CUSTOMER PERSPECTIVE

Customers need to understand their options.

A good configuration process guides customers from the base product to their own selection. Every step should have a clear purpose.

Start with choices customers understand

Use familiar names and explanations from your sales conversations. Separate the base model, dimensions, appearance and accessories. Explain technical parameters in practical terms: what they change, what they do and when a customer needs them. Leave specialist decisions that customers cannot safely make themselves for a consultation.

Step	The customer's task	The solution's role
1. Base product	Choose a suitable model.	Explain the differences and help customers find their way.
2. Customisation	Select dimensions and variants.	Explain the choices and apply the agreed rules.
3. Accessories	Consider which extras they want.	Explain their purpose and how they relate to the product.
4. Enquiry	Confirm the selection and provide contact details.	Clearly summarise the requirements and next steps.

3D visualisation supports the decision

For a pergola, customers need to picture the structure, selected finish and accessories. For another product, shape, layout or material combinations may matter more. The scope of the visualisation and the controls should therefore reflect the product; one interface may not suit your entire range.

What to avoid

Too many choices at once, unexplained technical terms and an enquiry form that does not explain what happens next. Test the selection process with someone unfamiliar with your product range.

An enquiry is the start. Follow-up creates the value.

Even a well-prepared configuration needs a salesperson to take it forward. Before launch, agree who will handle enquiries and how they will work with them.

What the salesperson should receive

Agree what the summary includes: product identification, selected dimensions, variants and accessories, together with the customer's contact details. Distinguish the customer's wishes from a technically validated order. A configuration provides a clearer basis for the conversation; it does not automatically mean the product is ready for manufacture.

Who takes responsibility for the response?

Assign an owner to each enquiry, arrange cover for their absence and set an internal target for first contact. Salespeople should know where to find the customer's selection, which questions still need answering and when to involve a technical specialist. Without this process, visualisation alone will not solve enquiry handling problems.

Where treede fits in

The treede offering includes its own CRM for handling enquiries. During project planning, we review how it will support your sales process and what information is needed. Integrations with external CRMs and other systems are in preparation; they should not yet be treated as available when planning implementation.

Agree before launch	Practical outcome
Who replies to the customer	Every incoming enquiry has a named owner.
What still needs technical validation	Salespeople do not promise an unverified specification.
How conversation outcomes are recorded	You can distinguish a relevant enquiry, a quotation and an order.

A configurator does not always need to display a price

If pricing depends on a site survey, delivery or project-specific installation, the configurator can collect the details needed for a quotation. The scope of any price calculation is agreed around your rules and the information you provide.

04 / PREPARING YOUR INFORMATION

You may already have the key information in-house.

A catalogue is a useful starting point. To configure the solution accurately, we also need the rules your team uses to sell and deliver the product.

Information	What to prepare	Who can validate it
Product range	Models, names, photographs, drawings and any existing 3D assets.	Product / production
Customer choices	Dimensions, materials, colours, accessories and explanations of the differences.	Sales / product
Combination rules	Permitted dimensions, accessory dependencies and exceptions requiring individual review.	Technical / production
Pricing information	Calculation method, surcharges and items priced individually.	Sales / management
Brand and languages	Logo, visual identity, terminology and the languages of your target markets.	Marketing
Enquiry handling	Required information, responsible contacts and the process after an enquiry is received.	Sales lead

Start with one representative product

Choose a product that sells regularly, has clear options and follows rules you understand. Use it to test both the customer experience and the salesperson's workflow. Expansion to other models can then build on practical experience.

Decide who signs off accuracy

Technical specialists validate feasible combinations, sales checks whether the enquiry is clear, and marketing reviews the presentation. For other language versions, check specialist terms and local conventions for dimensions and materials. A translation alone does not validate the product information.

The output of preparation

One agreed list of options and rules, with clear responsibility for their accuracy. Identify any gaps in the information before they become part of the specification.

05 / IMPLEMENTATION AND ONGOING SUPPORT

Launch is the first milestone. Your product keeps evolving.

The configurator should stay aligned with your product range after launch. Discuss operation, support and how changes will be handled when agreeing the project.

1. Feasibility review and a simple demonstration

In the initial meeting, we review the product and the purpose of the solution. After assessing feasibility, we can prepare a simple demo free of charge. It helps illustrate the selection process and visualisation. Production implementation has a separately agreed scope, rules, testing and price.

2. Scope, preparation and test scenarios

Agree which models and options the first version includes, what information is passed to sales and who approves the result. Test typical and boundary dimensions, accessory dependencies and enquiry submission. Check readability and usability on mobile devices and computers.

3. Operation and ongoing updates

A new material, a discontinued accessory or a pricing rule change may require an update. Decide who requests changes, who approves them and how accuracy will be checked afterwards. Agree the scope of support, maintenance and further development individually.

4. Traffic and sales follow-up

Give the configurator a clear place in the customer journey. Link it from relevant product pages and use it in sales conversations. Campaigns can also help bring visitors to it. We can provide marketing services and a company website as optional additions; implementation alone does not guarantee enquiry volumes.

What a quotation should include

The scope of development and implementation, monthly operation, agreed support and how further changes will be priced. For campaigns, separate the service fee from media spend. We prepare a tailored quotation.

06 / MEASURING VALUE

Track changes in sales, not just on your website.

Before launch, record how enquiries are generated and handled today. Use the same approach to assess the period after implementation.

Metric	How to interpret it
Configuration completion	Completed selections as a share of started configurations. Helps assess whether customers can finish the selection process.
Submitted enquiries	Submitted enquiries as a share of started configurations. Track absolute numbers and traffic sources separately.
Enquiry relevance	The share of enquiries that sales considers genuine opportunities. Agree the criteria in advance.
Time to prepare a quotation	Compare working time on similar enquiries before and after launch. Also track the need to request missing information.
Progress towards an order	How many relevant enquiries progress to quotations and orders. Allow for the typical length of your sales cycle.

Compare like with like

More enquiries may also reflect a higher campaign budget, seasonality or changes to the product range. Assess traffic sources separately and discuss the results with salespeople. With small samples, focus on specific reasons for abandonment and the quality of enquiry details rather than drawing broad conclusions from percentages.

First agree what will be recorded

These metrics are a proposed measurement framework, not a list of features available by default. The scope of analytics and record-keeping needs to be confirmed in the project specification. Your sales team can also use its own simple records to track processing time or reasons for lost opportunities.

A practical review cycle

After launch, address errors and points where customers drop out first. Then combine usage data with feedback from sales at regular intervals. Choose improvements that address a specific problem.

07 / YOUR NEXT STEP

Choose one product. We will explore the possibilities.

You do not need a complete technical specification for the first meeting. A specific product and an idea of what you want to make easier for customers or salespeople are more useful.

Five questions before the initial consultation

1. For which product do you most often explain the same options?
2. Which decisions can customers make themselves, and which need technical approval?
3. What information does a salesperson need to prepare a quotation?
4. Who will handle incoming enquiries and approve product changes?
5. How will you know the solution is helping after launch?

What treede can provide

A 3D configurator tailored to your product, our own CRM for handling enquiries, and agreed operation and ongoing support. If you need help attracting visitors, we can add marketing services or a company website. We always assess technical feasibility and scope against your specific requirements.

See the solution on your own product first

Following a short consultation and suitability review, we prepare a simple demo free of charge. We then propose the scope, price and timeline for a potential implementation.

Book a no-obligation demo

treede.eu

Name

Email

Phone

This guide draws on sales process design and the scope of the treede offering. It does not present guaranteed results or statistical benchmarks.