

Deal Margin Management

Whitepaper – Explaining Pigment Features



Reimagining Deal Margin Management with Pigment

Deal Margin Management in services or project-based industries is often slowed by fragmented communication, version mismanagement, and inconsistent modeling logic. It spans multiple teams — Sales, Finance, Delivery, CXOs — and requires cross-functional alignment at every step from deal creation to client approval.

Yet, most organizations still operate using siloed spreadsheets, back-and-forth emails, and error-prone offline models — leading to delays, inaccurate P&L assumptions, and poor margin decisions.

Key Capabilities of an EPM-Powered Deal Margin Management Model:

Real-Time Collaboration Across Teams

Empower Sales, Bid Managers, Finance, Delivery, and CXOs to input, simulate, and review deal data in real-time — avoiding version chaos and misalignment.

Dynamic P&L Modeling & Scenario Planning

Easily simulate different contract structures, effort models, delivery plans, or vendor costs. See the real-time impact on margins and profitability across business units and geographies.

Workflow Automation with Audit Trails

Streamline standard flows:

An Enterprise Performance Management (EPM) platform like **Pigment** offers a real-time, collaborative, and auditable solution for managing deal margin workflows with clarity and control. It empowers every stakeholder with a unified source of truth — enabling smarter, faster, and more profitable deal decisions.

Deal Creation → Team Formation → Resource Mapping → TCV Estimation → P&L Modeling → Review & Approval
Track every update and decision point with complete version history and audit readiness.

Sensitivity Analysis & Risk Modeling

Quickly test the impact of changes in effort mix, resource costs, billing models, or scope assumptions — helping CXOs identify profitable vs risky deals.

Deal Dashboards & Margin Insights

Give leadership a live view of top-margin deals, client-wise profitability, effort vs price trade-offs, and variance from benchmarks — all in one place.

Maximize Profit, Minimize Friction — End-to-End Deal Margin Management in Real Time with Pigment

Automations & Intelligence

FEATURESET1

1. Workflow Automation

Use Pigment's workflow automation and role-based triggers to intelligently route deals, assign stakeholders, and flag delays. Eliminate guesswork and manual oversight in assigning Bid Managers or tracking deal movement based on Total Contract Value (TCV) or region.

Insights & Reusability

FEATURESET2

1. Insights

Uncover the “why” behind your P&L in just one click.
Use interactive dashboards to:
Identify high-margin vs low-margin deals
Spot trends across clients, geographies, and service lines

Modelling, Auditing & Accuracy

FEATURESET3

1. Scenario Modelling

Create real-time P&Ls with no formula risk. Simulate what-if scenarios like cost changes, delivery model shifts, or resource variations — all linked dynamically across stakeholders.

2. Workflow Sequencing

Automate sequential steps like:
CRM Deal Entry → Bid Manager Assignment → Team Formation → Resource Planning → Finance P&L → Review & Approvals.
Improves traceability and keeps high-value deals on track.

3. Snapshots & Version Control

Capture versions of every P&L iteration or stakeholder input. Roll back when needed, track contributor changes, and maintain audit history for governance and compliance.

FEATURESET 4

Collaboration, Governance & Review

1. Commenting & Threads

Keep context-rich discussions directly in Pigment. Avoid email chains — every input or metric can have built-in comment threads for streamlined collaboration.

2. Approvals & Audit Trail

Use structured approval workflows (e.g., Business Reviewer → CXO) to route deals with automated dashboards, logs, and compliance-friendly traceability.

3. Notifications & Alerts

Set up real-time alerts and dashboards to track review bottlenecks, pending inputs, or overdue approvals. Improve accountability without micromanagement.

4. Role-Based Access & Routing

Control visibility for Sales, Delivery, Pricing, and CXOs based on deal stage. Auto-assign collaborators based on deal size or geography with clear accountability logs.

FEATURESET 5

Data Interaction & Flexibility

1. CRM & CPQ Integrations

Integrate Pigment with tools like Salesforce or HubSpot to pull deal data and push final P&Ls into quoting systems (CPQ). Ensure real-time sync across sales and finance.

2. Dashboard Views for CXOs

CXOs get tailored dashboards — no Excel needed — to quickly approve deals, analyze margin by client, region, or vertical, and make faster decisions.

3. One-Click Exports

Generate client-ready quotes and deal summaries in standardized formats with a single click — reducing manual copy-paste errors.

Challenge Area	Traditional Methods (Excel, Manual)	Pigment Solution (Modern, Intelligent)
Deal Creation & Team Setup	Disconnected processes, manual inputs, unclear roles	Workflows + Collaboration streamline deal setup, assign roles, and ensure centralized input
Effort Estimation & Resourcing	No integration between delivery effort and margin models	Scenario Modeling allows resource-mix simulation and real-time margin impact
Total Contract Value (TCV)	Static TCV calculations, version chaos with client updates	Version Control + Snapshots allow teams to compare different deal versions seamlessly
Expense Calculation	Offline files with inconsistent assumptions	Automated Calculations + Central Libraries ensure consistent assumptions (e.g., billing, delivery rates)
P&L Creation & Review	Complex Excel sheets with nested logic, prone to errors	Sequence Logic + P&L Modules dynamically roll up effort, cost, and pricing inputs
Sensitivity Analysis	Manual models that lack real-time flexibility	Scenarios + Snapshots enable risk-based margin comparison across price/effort/delivery combinations
CXO Review & Collaboration	Email loops, inconsistent data, delayed approvals	Commenting + Live Review Dashboards enable CXO participation and faster decisions
Final Deal Approval	Last-minute margin changes not visible to finance/sales	Audit Trail + Alerts for margin changes ensure final version alignment before submission
Reporting & Tracking	No real-time visibility into margin drivers or deviations	Insights Dashboards show deal-wise margin, top client profitability, and effort-price trade-offs
Reusability & Benchmarking	Models rebuilt from scratch per deal	Reusable Libraries store delivery assumptions, pricing benchmarks, and common deal structures

Thank You!