

Enterprise CPQ Vendor Evaluation Scorecard

Do you need an enterprise-level configure-price-quote (CPQ) solution?

Any "yes" answer qualifies you for Enterprise CPQ.

Yes

My organization has:

Complex, highly customizable products, services, systems or solutions

Multiple roles involved in the sales process, including dealers, sales or sales support teams, customer service representatives and others—each with different functions and needs

The need to respond quickly with comprehensive, compelling quotes or proposals

The need to automatically produce accurate, configuration-specific outputs to drive manufacturing or other forms of fulfillment

The need to be "easy to do business with" regardless of the complexity of the solutions we sell

Does the vendor you're evaluating provide the following detailed capabilities?

Don't just take "yes" as the answer—be sure to ask "how" they provide each capability.

Vendor Name

No

Yes

If yes, how?

General

Single CPQ platform to support all direct and partner channels

Fully integrated with CRM or ERP systems

Easily integrated with e-commerce or custom apps

Full mobility—any browser, tablet or smartphone

Fully customizable, role-based user experiences

Robust back-office management system

Guided Selling and Configuration

Guided customer dialogs such as needs analysis

Guided product selection based on customer environment

Guided product or service configuration—support for complex solutions and systems

Dynamic cross-sell/upsell recommendations

Dynamic visualization

Pricing

Dynamic pricing

Unlimited date-effective price lists

Flexible rule-based pricing

Administration tools to define applicable price conditions

	Vendor Name	No	Yes	If yes, how?
Proposal Generation				
Options from simple quote to full proposal packages				
Full proposal document/template management system				
Rules-driven dynamic proposal generation with automated inclusion of quote details				
Configured Output Generation				
BOMs and other manufacturing information				
Project tasks				
CAD models and drawings				
Rendered or static images				
Key Quoting Support Functions				
Searchable, content-rich product catalog for both standard and configurable products				
Robust special-request handling				
Flexible quote structure with any combination of product or service lines and sublines				
Configuration and quote templates for frequently sold items				
Quote approvals and revision control				
Role-tailored capabilities to support various user privileges and organizational structures				
Extendibility with custom fields and actions				
Channel partner capabilities: customer information, dealer products and options, branded quote/proposal documents				
Multi-lingual, multi-currency capabilities				
Deployment				
Cloud or on-premise				
Highly scalable				
High availability				



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