



NUCLEUS
RESEARCH

CPQ TECHNOLOGY VALUE MATRIX 2023

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THE BOTTOM LINE

As configure, price, and quote (CPQ) development progressed in 2023, it significantly enhanced sales effectiveness and accuracy, especially in complex sales environments. Advancements in analytics, machine learning, and AI capabilities are not limited to product configuration but extend to pricing management and lifecycle administration. User interface innovation, adaptable workflows, and mobile-first designs are leading to higher adoption rates in sales teams. Mergers and acquisitions are further reshaping the market, with CRM and ERP systems increasingly incorporating CPQ solutions. This integration reflects CPQ's growing importance in meeting current market demands and shaping future sales and customer experience strategies.



OVERVIEW

As organizations venture into 2024, the configure, price, and quote (CPQ) market reinforces the technology’s role in the modern revenue lifecycle, particularly in complex sales and multifaceted channel structures. The technology’s advancements are not limited to product configuration but extend to improving overall sales effectiveness. CPQ’s agility in responding to changing customer needs and pricing dynamics is invaluable, especially in scenarios requiring software that supports high rates of change. The evolution in user interface design, intuitive workflows, and a focus on mobile-first development is leading to increased adoption levels among sales teams.

This year, advancements in the CPQ space are focused on extending beyond product configuration. The industry is witnessing a shift towards prioritizing effectiveness over efficiency. Analytics, big data, generative AI, and machine learning capabilities enable organizations to further enhance pricing optimization, identify upsell and cross-sell opportunities, and reduce cost to serve through automated customer interactions. For example, these technologies enable advanced demand forecasting in CPQ processes, allowing organizations to tailor pricing and product configurations based on projected customer demand. Organizations can leverage AI to facilitate the creation of personalized CPQ strategies by analyzing customer data to suggest the most effective upsell and cross-sell opportunities during the quoting process. Predictive analytics in CPQ can also help in identifying potential supply chain issues, ensuring the availability of products and components for complex configurations. Additionally, real-time pricing adjustments are made possible by AI in CPQ systems, dynamically aligning quotes with market trends, inventory levels, and customer purchasing behaviors.

In addition, the integration of field service management with CPQ systems offers significant benefits, particularly in automating and streamlining service processes. This integration enables real-time data flow between field services and sales, ensuring accurate and efficient quoting, reducing errors, and enhancing customer satisfaction through more efficient and reliable service delivery. These benefits highlight CPQ's role in meeting current market needs and laying a foundation for future developments in sales and customer experience management.

The CPQ market throughout 2023 has seen an uptick in partnerships and acquisitions. CRM and ERP vendors are integrating CPQ solutions to enhance their platforms' capabilities, indicating a strategic shift in the market. This integration signifies a deeper penetration of CPQ technology into broader business systems, allowing vendors to offer more comprehensive solutions to their customers. The alignment of CPQ systems with enterprise platforms is a key component of go-to-market strategies, reflecting an understanding of the need to provide holistic solutions to complex sales challenges. In addition, the combination of CPQ with ERP systems directly impacts inventory management, providing clear visibility into stock levels and lead times for improved sales quoting. This integration improves supply chain management, offering accurate estimates for product arrival and delivery. Aligning CPQ with ERP systems helps organizations better manage inventory and anticipate supply chain challenges, leading to smoother customer interactions. This approach also aids in refining supply chain operations, aiming to minimize lead times, reduce cost to serve, increase customer satisfaction, and reduce refunds.

The Nucleus Research CPQ Technology Value Matrix provides an assessment of the market based on how vendors deliver value to customers through the usability and functionality of their solutions (Nucleus Research v67 – Understanding the Value Matrix, April 2021). The research is intended to deliver a relevant snapshot of the CPQ technology market, rather

than serve as an empirical ranking of the vendors. The arrows indicate each vendor's perceived momentum and are informed through conversations with end users, recently released capabilities, features, and other areas of investment.

LEADERS

Leaders in the Value Matrix include Conga, Epicor, Infor, Oracle, PROS, and Salesforce.

CONGA

Conga retains its position in the 2023 CPQ Technology Value Matrix. Conga CPQ facilitates the configuration of complex products and services through a code-free rules engine. Developed on the Salesforce platform, it provides native integration and also demonstrates interoperability with platforms such as Microsoft, AWS, Accenture, SAP, and Oracle. One of the standout benefits Conga offers is end-to-end revenue lifecycle management. This includes support for the entire revenue lifecycle and a full suite of pre-integrated solutions such as CPQ, CLM, digital commerce, billing, order management, eSignature, and DocGen. With an API-first approach, Conga ensures customers can seamlessly integrate their existing systems as part of their revenue lifecycle solutions. In addition, Conga's unified data model enables users to implement product and pricing specifications across various functionalities, sidestepping the intricacies of multi-channel API management.

The Conga platform is both open and scalable, ensuring swift performance, even with the configuration of sizable, intricate carts. Beyond delivering top-tier pricing and promotion functionalities without the need for extra coding, the platform now offers the flexibility to embed CPQ abilities into revenue lifecycle management operations. This integration serves both present and evolving business requirements across all channels, such as websites, partner portals, and sales apps, harnessing consistent data throughout. In addition, this enhancement greatly benefits the customer experience, offering guided configuration and personalized pricing self-service capabilities for any B2B website. In early 2023, Conga unveiled the Conga Revenue Lifecycle Cloud, a cloud platform tailored to address the intricacies of revenue management. This transition from applications to a comprehensive open cloud solution elevates Conga's capabilities available for customers aiming to revamp their revenue lifecycles.

EPICOR

Epicor is positioned as a leader in the 2023 edition of the CPQ Technology Value Matrix. Epicor CPQ is available as a distinct platform or can be seamlessly integrated with Epicor

Industry ERP cloud spanning Kinetic, Prophet 21, and BisTrack. Epicor CPQ accentuates smart visual selling, promoting more streamlined sales operations that assist sales teams in amplifying quote volume and precision. Through Epicor CPQ, pricing is dynamically and automatically adjusted based on real-time user interactions, governed by preset rules orchestrated by a sophisticated rules engine to ensure configuration accuracy and consistent pricing. Rule creation is simplified for users through an intuitive drag-and-drop interface. In addition, Epicor's 2D and 3D enhanced product visualizations facilitate swift and engaging purchasing interactions for sales personnel, distributors, and consumers on both mobile and desktop platforms. The platform also integrates CAD automation features, enabling users to autonomously produce precise drawings, files, bills of materials, assembly directives, parts inventories, and product visuals.

Over the past year, Epicor has unveiled several enhancements to its product offerings. A notable advancement is the introduction of new features aimed at facilitating self-service buying experiences, even for highly customized or intricate products. This includes the new Method of Manufacture (MoM) viewer widget that can be incorporated in layouts, enabling end configurator users to examine the MoM during configuration. Additionally, upgrades aimed at mitigating IT overhead while fostering the adoption of new technology is evidenced by new capabilities such as the ability to invoke server-side configurator rules via the REST API, ensuring a thoroughly headless product configurator experience.

INFOR

Infor is a leader in this year's Value Matrix, recognized for delivering bespoke functionalities and item configurations for a diverse range of industries. As a subsidiary of Koch Industries, Infor possesses multiple advantages from this affiliation, including a significant partnership with Deloitte. Infor's unified digital business platform integrates components like Infor OS and Infor Analytics, catering to extensibility, AI, process automation, data management, and system integration. As a dedicated cloud solution, Infor champions its full multi-tenant SaaS, hosted on AWS, showcasing the application of best practices, collaborations, integrations, machine learning, and analytics. Infor's CPQ solution supports seamless integration with a multitude of applications, from Salesforce and Microsoft CRM to several ERP and e-commerce platforms. It's The solution suite is designed to fuel sales revenue, minimize quotation errors, and amplify market awareness through its visual configuration tools. The visual configuration platform not only facilitates an interactive experience for consumers but also provides tools like 2D drawings, 3D models, Augmented Reality (AR), and tailor-made CAD assemblies. These tools empower users to fully visualize products in 3D, plus generate product blueprints, while simultaneously auto-generating essential manufacturing data. In addition, Infor's platform has expanded to support third-party tax calculation, electronic signatures, and workspace testing.

In late 2022 and throughout 2023, Infor introduced notable enhancements to its CPQ offerings. The vendor incorporated role-based access for data import API management, ensuring more streamlined and secure data handling, and an improvement in the usability of 3D visual configuration and design automation. In line with Infor's dedication to seamless integration, the Call Creo CAD Add-in Rule has been integrated, enabling CREO Extensions within CPQ. This offers an enriched CAD 2D/3D integration experience for users. In addition, Enterprise Quoting (EQ) has been revamped, adopting Infor Portal UI themes and further leveraging Infor OS functionalities and integration capabilities. This not only simplifies the quoting process but also ensures it aligns with the broader Infor ecosystem. Infor has also introduced industry-specific packs for Automotive Supplier and ETO Manufacturing, showcasing their dedication to tailor-fit solutions.

ORACLE

Oracle CPQ, recognized as a leader in the 2023 CPQ Value Matrix, is a cloud-driven application, that is adaptable to a wide array of CPQ scenarios spanning sectors such as communications, manufacturing, engineering, construction, high-tech, healthcare, financial services, and utilities. This solution is part of the Oracle Advertising and Customer Experience (CX) suite, designed to optimize and demystify intricate product configuration and quotation processes. While Oracle CPQ is available as a standalone solution, its breadth of functionality is elevated when tightly integrated within Oracle's CRM, ERP, and B2B commerce platforms. In addition, the system caters to subscription quotation and payment handling, encapsulating facets like subscription annuities, support contracts, renewals, proportionate pricing, and subscription quotes via its connection with Oracle Subscription Management. Over the last year, Oracle announced several new features and capabilities including the introduction of the Commerce Standard Process. This process encompasses pre-defined quoting, ordering, integration, and other workflow procedures. Through the Standard Process, Oracle CPQ aims to foster product standardization and furnish consistent integration elements. It is equipped with features frequently utilized by customer implementations to bolster their sales processes. Additionally, Oracle has incorporated a new Fusion Customer Relationship Management (CRM) integration type into the Oracle CPQ Integration Center. This feature streamlines the configuration and management of the connection between Oracle CPQ and Oracle Fusion Sales (CX Sales).

PROS

PROS is a leader in the 2023 CPQ Technology Value Matrix, recognized for its PROS Smart Configure Price Quote solution. Leveraging AI-driven pricing and sales insights, PROS enables users to efficiently generate precise and tailored quotes for potential buyers. Its hybrid structure, free from governor constraints, allows PROS to accommodate extensive

quotes, proposals, and RFPs that contain numerous line items. As a component of the PROS Platform, PROS Smart Configure Price Quote can be integrated with PROS Smart Price Optimization and Management, if preferred, to ensure cohesive omnichannel sales throughout the entire sales journey. Additionally, PROS's AI-derived pricing and product suggestions grant users enhanced dynamic pricing capabilities, streamlining the sales process and preventing potential revenue leakage. The PROS Smart Configure Price Quote presents users with a constraint-driven configuration engine. This adaptability empowers businesses to transition from basic product offerings to meet the intricate requirements of multinational corporations, particularly in the manufacturing, distribution, and various service-focused sectors. In addition, the PROS Performance Quoting Designer acts as a centralized administrative dashboard that optimizes the time-to-value ratio for PROS customers. This tool is a self-operated, multi-user interface responsible for the configuration and upkeep of quote computation logic, integration with external data repositories, and the shaping of the overarching quote user experience.

Another notable feature of the PROS Smart CPQ is its microservices architecture, combined with an API-first methodology in product development and modular go-to-market strategies. This design framework ensures PROS's adaptability to any selling motion across any channel. Over the last year, PROS has unveiled several new product features and capabilities, highlighted by AI Studio. Users can leverage AI Studio to deploy, train, test, and manage proprietary AI models, eliminating the need to construct a separate platform. User experience has been a focal point of enhancement. Users can now drag, insert, edit, filter, and search for products and bundles. Administrators are also afforded an enhanced experience with the introduction of a history panel in the Quoting module's administration portal, facilitating the management of quote model versions. For industries like food and chemicals, scaled pricing in PROS Smart CPQ remains vital. The platform has optimized import and export scaled grids, allowing scale-based price and unit measurements in quote computations.

SALESFORCE

A component of the vendor's Revenue Cloud called Salesforce CPQ provides extensive skills for managing products, quotes, orders, contracts, and subscriptions that are useful for many different industries. The entire solution is automated, with features like duplicate payment detection, real-time price adjustments, and automatic renewal reminders preventive and personalized requests for permission. The CPQ platform incorporates Salesforce Einstein, which offers users suggested prices and products on a guided basis. Features of the platform's approval customizations expedite clearance procedures while providing notifications that increase managers' visibility and ensure that quotes are accurate. Additionally, Salesforce has a database of more than 5,000 certified CPQ experts.

Most SaaS environments can be connected with Salesforce CPQ to assist enterprises in managing and supporting a variety of transaction types, income sources, and sales channels.

Salesforce announced a series of new updates and features throughout 2023, including improved security, elevated browser performance, and the ability for users to create more complex nested bundles. To heighten security, the platform now enables access to its external calculation service through an integration user with a short-lived access token, eliminating the need for storing long-lived tokens. Additionally, thanks to the incorporation of Web Components V1 technology, users will experience brisker browser performance. In addition, Salesforce CPQ's external configurator now supports more complex nested bundles, allowing configurations of up to three layers of nested child products, inclusive of two levels of nested bundles and one of nested options.

EXPERTS

Experts in the Value Matrix include Revalize, SAP, and Veloce.

REVALIZE

In the 2023 CPQ Technology Value Matrix, Revalize is acknowledged as an expert for its specialized proficiency in catering to niche business sectors. Revalize offers several CPQ solutions including FPX for discrete manufacturers, Auto Quotes for food service equipment and supplies, and the vendor's all-encompassing Configure One Cloud solution. Each solution provides targeted functionalities to enterprises in various verticals, enabling users to assess intricate, engineered procedures. Revalize's dedicated solutions integrate both front-end and back-end services with platforms such as Adobe, IBM, Oracle, SAP, Salesforce, and others. Revalize's emphasis on the B2B landscape allows it to offer comprehensive configurations for extensively personalized products, ensuring that users retain consistent brand portrayal and product criteria. Thanks to its innate capabilities tailored for geographically-centric selling and modifiable constraints, Revalize assists organizations in crafting precise sales tactics.

SAP

Recognized as an expert in the 2023 CPQ Technology Value Matrix, SAP CPQ stands out for its capacity to cater to enterprise-level organizations across sectors such as automotive, financial services, high-tech, manufacturing, retail, insurance, and communications. Designed to handle large-scale quotation processes, the solution swiftly manages quotes extending over 10,000 lines. A significant advantage of SAP CPQ is its seamless integration

within the broader SAP tech ecosystem. This integration not only ensures cohesion and efficiency but also enables the leveraging of customer data and the suite's intrinsic capabilities. This positions sales teams to refine their strategies and utilize artificial intelligence for suggesting ideal pricing, highlighting SAP's ongoing commitment to AI enhancement. In addition, SAP consistently broadens its functionality by investing in third-party integrations with ERP and CRM platforms. This enriches the customer experience, offering a tailored approach while simplifying interactions across different systems. Being nestled within the extensive SAP tech stack amplifies its capability, as users can derive synergistic benefits from the interconnected tools and resources available. In its latest release, quote visibility rule administration on Quote 2.0 has been revamped, enabling users to create advanced conditions to be set without needing knowledge of SQL or CPQ database queries.

VELOCE

Headquartered in San Francisco, Veloce distinguishes itself as an Expert in this year's CPQ Technology Value Matrix. Rooted in Salesforce, Veloce delivers specialized CPQ solutions that infuse advanced functionality tailored to distinct use cases. The platform enriches Salesforce's capabilities, aligning seamlessly with an organization's incumbent sales strategy. Veloce's high-performance configurator manages intricate quotes, boasting speeds that cater to up to 50,000 line items with sub-second response times. Simultaneously, its guided selling tools streamline the sales process, aiding teams in generating precise, personalized quotes promptly.

Veloce's recent innovations include a powerful stateful configuration engine and API composer facilitating easy integration across multiple channels and applications, further elevating its position in the CPQ landscape. The platform has unveiled several enhancements over the past year, including a compatibility matrix for product inclusivity and exclusivity, enhanced shopping cart features that offer customized bundling options, and a guided selling builder for efficient setup and maintenance. Recognizing the evolving needs of its customers, Veloce has introduced attribute-based pricing improvements, catalog procedures and advanced approval functionalities, ensuring adaptability and precision in its service offerings.

FACILITATORS

Facilitators in the Value Matrix include CloudSense, DealHub.io, servicePath, Yagna iQ, and Zuora CPQ.

CLOUDSENSE

CloudSense is recognized as a Facilitator In the 2023 CPQ Technology Value Matrix. Developed on the Salesforce platform, CloudSense is tailored for B2B organizations in sectors marked by intricate requirements such as data centers, media, utilities, and communications. The solution boasts a diverse range of capabilities encompassing product cataloging, order administration, contract handling, document generation, and digital commerce. Its product catalog utility empowers businesses to utilize low and no-code features, facilitating even non-technical users to introduce new offerings and effortlessly configure both static and dynamic bundles encompassing products, services, and subscriptions. In addition, the platform consolidates all pricing details, product specifics, and services within a singular master catalog. This amalgamation aids users in deal optimization, streamlining approval routines, and discount management via an integrated platform. Its contract management tool, seamlessly integrated with Salesforce, allows for the infusion of Salesforce data into contracts, thereby accelerating sales operations. CloudSense also equips its users with an order management feature, facilitating the automation of workflows via intuitive drag-and-drop functionalities. The solution provides real-time tracking of order statuses, categorizing them under products, services, subscriptions, and assets, thus offering enhanced visibility.

Telco One was recently launched as the newest offering from CloudSense. This comprehensive solution stands distinct in the market with its complete definition and robust documentation, which encompasses user guidance, functional configuration, and technical extensions, all ready for immediate customer utilization. Engineered on CloudSense's high-caliber CPQ engine, Telco One is meticulously crafted to align with the specialized demands of today's communications service providers and managed service providers. The solution's core attributes revolve around diminishing implementation vulnerabilities, propelling speed-to-value ratios, and smoothing out intricate quote-to-cash processes via a refined workflow

DEALHUB.IO

In the 2023 CPQ Technology Value Matrix, DealHub.io is recognized as a Facilitator and earned the top spot in usability. The DealHub sales engagement platform caters to a diverse set of industries encompassing B2B technology, finance, manufacturing, and professional services. The solution offers a comprehensive toolset designed to streamline the entire sales cycle, placing an emphasis on expediting sales procedures and augmenting both pipeline and project visibility for sales professionals. The platform's no-code, scalable nature reduces the dependency on IT, fostering seamless adoption by end-users. A standout benefit for end users is DealHub's intuitive design coupled with its swift deployment duration, which plays a pivotal role in its selection.

The CPQ functionality of DealHub refines the quotation process, granting sales teams a suite of collaborative tools. Some of its notable features encompass real-time alerts, monitoring of buyer activities, and the DealHub Playbooks. These playbooks, equipped with guided selling flows based on questions, are customizable to reflect each organization's specific workflows. These tools suggest actions, queries, products, and pricing, assisting sales personnel in boosting deal closure rates and capitalizing on cross-selling and upselling prospects. Due to DealHub's strong integration features, any updates made are automatically synchronized across the CPQ, CRM, and ERP systems.

DealHub.io has recently announced a series of innovative updates and enhancements. These include precision decimal rounding capabilities tailored for compliance with Japan's currency conversion requirements, advanced product filtering for improved customer search experiences, and a fresh UX/UI release that promises a more intuitive and efficient user interface. The platform has also introduced a powerful Deal Desk dashboard for enhanced deal management, along with customizable user notification preferences for a more personalized user experience. On the platform completeness front, DealHub.io now offers a comprehensive Billing solution with subscription and consumption-based billing options, enriched by robust API and ERP integrations, and seamless invoicing software connections. The DealRoom feature has been upgraded with a new UX/UI, common pricing tables, downloadable documents, and the DealBox content depository for better document management. Additionally, dynamic multi-signature capabilities have been integrated to streamline the signing process. The platform's multi-channel communications are bolstered through integrations with Slack and Gong, as well as the introduction of DealTalk for internal and customer communications within the DealRoom, enhancing overall communication efficiency and sales process organization. These advancements demonstrate DealHub.io's commitment to continuous innovation, ensuring that their sales engagement platform remains at the forefront of facilitating efficient, customer-centric sales experiences.

SERVICEPATH

servicePath is recognized as a Facilitator in the 2023 CPQ Value Matrix, recognized for its scalability and capacity for accelerated implementation timelines. servicePath specializes in providing a best-of-breed quote-to-cash solution, catering to organizations that often require seamless integration due to frequent acquisitions. API integrations into ERP systems facilitate the consolidation of multiple acquisitions into a unified platform, a feature that resonates with large-scale customers. Originating from a telecommunications background, servicePath demonstrates a deep understanding of verticalized needs, enabling the vendor to help users streamline quoting processes effectively. A standout feature of servicePath's offering is the ability to simplify complex sales trajectories, making the entire process more efficient and straightforward. Another distinctive facet of servicePath is its 'cost to serve' model. This caters to stakeholders who necessitate a granular understanding of the cost

basis. The platform provides comprehensive insights into how costs are generated, allowing for intricate cost modeling to be executed seamlessly within the system.

servicePath maintains an agnostic approach to revenue types, and has a strong comprehension of utility or usage pricing and the nuances of recurring revenue. servicePath's platform is particularly adept at managing multi-year contract engagements, facilitating up-selling and cross-selling opportunities throughout the contract lifecycle. servicePath's solution selling approach is designed to empower a broad spectrum of users, and the platform encourages users to engage in business-level inquiries. This strategy substantially reduces the dependency on pre-sales personnel, ensuring a more streamlined and autonomous sales journey.

YAGNA IQ

Yagna iQ, with a primary focus on the Channel, specifically resellers and distributors, is recognized as a Facilitator in this year's CPQ Technology Value Matrix. One of Yagna iQ's core offerings is its multi-vendor, multi-channel CPQ, designed to simplify the management of multiple vendors for resellers and MSPs. By eliminating the need for individual vendor logins, the solution addresses the complexity of the 1000-portal problem. Additionally, Yagna iQ's Channel CPQ Automation introduces renewals automation, a shift from traditional manual approaches. The platform also incorporates features for resellers, such as digital quote requests from multiple suppliers and an automated onboarding process.

Over the past year, Yagna iQ has introduced several significant product enhancements. Among these is the RFQ feature, allowing resellers and MSPs to request quotes from multiple suppliers and process the responses using ChatGPT Gen AI. The platform has optimized recurring revenue processes for distribution and resellers, introduced a multi-vendor renewal dashboard, and added functionalities for large quotes. Recognizing the global market, Yagna iQ has expanded its language support to include Chinese and Spanish. Other notable updates include a self-service system for onboarding and enhanced reporting and analytical capabilities.

ZUORA CPQ

Zuora CPQ is recognized as a Facilitator in the 2023 edition of the CPQ Technology Value Matrix. Zuora is a solution tailored specifically for subscription-based revenue models. Catering to a diverse range of industries, including healthcare, education, media, and communications, Zuora offers a cloud-based subscription management service through its SaaS platform. This platform streamlines subscription order-to-revenue operations in real-time, ensuring optimal and customized quoting that combines products, subscriptions, and services. A standout feature, Quote Studio, empowers users to handle both short and long-

term deals. Central to Zuora's offering is its capacity to synchronize and automate an organization's complete quote-to-revenue procedure. This synergy brings sales, finance, and operations teams onto the same page, providing an enhanced view into the financial ramifications of deal modifications. This visibility facilitates actionable adjustments to organizational strategy. The latest iteration, Zuora CPQ X, enhances the user experience by replacing older configuration pages with the revamped Quote Studio page. Users can seamlessly incorporate this into their quoting routines via the platform's Quote Wizard. In addition, Zuora X simplifies the structuring of ramp deals, further demonstrating the platform's commitment to reducing complexity and streamlining subscription management.

CORE PROVIDERS

Core Providers in the Value Matrix include IBM, Model N, and Tacton.

IBM

Recognized as a Core Provider in this CPQ Value Matrix, IBM Sterling CPQ remains an integral component of the IBM Sterling Supply Chain suite, predominantly serving organizations in sectors like telecommunication, industrial manufacturing, and retail. The solution seamlessly automates the lead-to-order cycle, granting users the capability to establish configuration rules, adjust pricing, and promptly produce quotes across multiple sales avenues. Key modules housed within the IBM CPQ ecosystem comprise the Omni-Configurator, Sterling Configurator Visual Modeler, and Sterling Field Sales.

The Omni-Configurator stands out by empowering users to tailor and package products and services across diverse channels, encompassing web stores, call centers, mobile platforms, and desktop interfaces, all in alignment with customer inclinations. The Sterling Configurator Visual Modeler facilitates the crafting of configuration models that can enforce specific rules and logic tailored to individual products. Complementing this, the Sterling Field Sales module consolidates essential purchasing data spanning customer particulars, pricing nuances, shipping information, pricing terms, and any product alterations into a centralized database. This consolidation significantly enhances the management of opportunities and quotations. Further enriching the platform's utility, the vendor's advanced search engine deftly sifts through data, pinpointing details on products, opportunities, and quotes.

Leveraging the combined functionality of IBM CPQ alongside IBM's ERP solution enables organizations to elevate inventory management, omnichannel delivery, and fulfillment efficacy. Additionally, the CPQ solution's integration with Salesforce CRM broadens the

horizon for joint clientele, providing users with heightened clarity and oversight into order processes.

MODEL N

Recognized as a Core Provider in the 2023 edition of the CPO Technology Value Matrix, Model N offers a variety of revenue management solutions tailored for B2B enterprises, particularly those in verticals like medical technology, pharmaceuticals, and high-tech manufacturing. Notably, the company has strengthened its position in the life sciences industry through a strategic partnership with Global Pricing Innovations, resulting in specialized updates to the Model N Revenue Cloud for Life Sciences. The suite also boasts end-to-end CPO capabilities, seamlessly integrating with CRM and ERP platforms, such as Salesforce and SAP. This integration enhances existing processes by adding price optimization and customizable approval workflows. Key features of Model N CPO encompass 3D product, part, and equipment configuration, coupled with automated contract generation. The guided selling feature offers users price recommendations and deal scores, while the ability to harness both internal and external company data empowers sales teams with deeper customer intelligence and provides managerial oversight into sales user activities. A defining characteristic of Model N is its adeptness at integrating with an organization's existing CRM and ERP solutions, simplifying complexities associated with varied pricing models like subscription, rental, and risk-based. This, in turn, aids customers in refining their sales strategies.

TACTON

The Tacton suite in 2023 continues to offer a range of cloud-based tools and features that run on AWS, specifically tailored to address the requirements of manufacturing organizations in sectors such as medical devices, industrial equipment, automotive, and energy. Its needs-based, real-time configuration functionalities effectively bridge the communication gaps commonly observed between internal teams like design, sales, and engineering. This not only promotes cohesive collaboration but also equips users with insights for enhanced customer service. Automation throughout the suite streamlines processes like quoting and order processing, simultaneously minimizing error margins. Furthermore, Tacton provides CAD automation, facilitating the creation of intricate customized CAD designs without necessitating advanced user expertise. The key value propositions of Tacton remain its customer-focused approach and its proficiency in assisting clients in selling bespoke products. In addition, the solution seamlessly integrates with CRM platforms, including those from Salesforce and Oracle, augmenting sales workflows and providing a comprehensive view of the customer journey.