

# Magic Quadrant pour les applications de configuration, de tarification et de devis

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Le marché des applications de configuration, de tarification et de devis (CPQ) continue d'évoluer vers des solutions omnicanales qui prennent en charge la vente de tous types de biens et de services. Ce Magic Quadrant évalue 15 applications de configuration, de tarification et de devis pour aider les acheteurs à trouver celle qui répond le mieux à leurs besoins.

## Définition/Description du marché

Gartner définit les applications de configuration, de tarification et de devis (CPQ) comme des logiciels qui permettent aux organisations commerciales d'automatiser et d'optimiser la création de devis et la capture de commandes.

Une application CPQ est un outil de vente qui capture les nouveaux biens et services qu'un client souhaite acheter ou les modifications qu'il souhaite apporter aux biens et services existants. Bien qu'elles soient généralement axées sur les canaux de vente assistés, les fonctionnalités CPQ telles que la configuration et la tarification des produits doivent être partagées avec le canal de commerce en libre-service. Les nouveaux achats et les modifications doivent être tarifés et un contrat contraignant doit être conclu avec le client avant d'envoyer une commande aux systèmes de traitement en aval.

### Caractéristiques obligatoires

Les caractéristiques obligatoires pour ce marché incluent :

- Assistance aux utilisateurs commerciaux, y compris l'intégration avec les solutions d'automatisation de la force de vente
- Recherche et sélection de produits et services à vendre
- Sélection des options et des fonctionnalités du produit (c'est-à-dire la configuration)
- Tarification automatique des produits et services choisis
- Négociation des conditions et génération de propositions
- Passation de commande
- Cadre d'extensibilité qui permet à une entreprise de mettre en place l'application pour ses processus, produits et services

## Caractéristiques communes

Les caractéristiques communes de ce marché incluent :

- Prise en charge du canal de commerce numérique via des interfaces utilisateur prédéfinies , des intégrations et/ou des API
- Vente et gestion d'abonnements
- Vente de biens corporels complexes
- Négociation de contrat
- Flux de travail d'approbation
- Intégrations prédéfinies avec des applications de traitement des commandes, telles que les ERP

## Quadrant magique

Figure 1 : Magic Quadrant pour les applications de configuration, de tarification et de devis





**Gartner.**

## Points forts et précautions du fournisseur

### Apparemmment

Apparound est un acteur de niche dans ce Magic Quadrant en raison de sa présence limitée sur le marché et de sa concentration sectorielle étroite. Il s'agit d'une société privée basée à Pise, en Italie. Apparound CPQ est particulièrement adapté à la vente de produits simples à l'aide d'un appareil mobile. Les principaux atouts du produit sont une application native sur Android, iOS ou Windows, lorsqu'elle est exécutée hors réseau, et la capture de signature sur les appareils mobiles. Il dispose d'intégrations produites avec Salesforce Sales Cloud, Microsoft Dynamics 365 Sales et HubSpot pour le canal de vente directe. Les revendeurs

peuvent créer des devis et des commandes via l'interface utilisateur standard d'Apparound. L'interface utilisateur de vente assistée est basée sur des API de services Web publics que les organisations peuvent utiliser comme base pour d'autres canaux, tels que le commerce numérique en libre-service . Le produit fonctionne sur Microsoft Azure et le propre centre de données du fournisseur.

### *Points forts*

- **Interface utilisateur mobile** : Apparound CPQ dispose d'une interface utilisateur réactive pour Microsoft Windows ainsi que d'applications natives pour Android et iOS qui fonctionnent lorsqu'elles sont déconnectées du réseau. Les applications mobiles prennent en charge la lecture de codes-barres et la capture de signatures. Il est également possible de capturer des paiements et des dépôts ponctuels et de planifier des paiements échelonnés. Ces fonctionnalités rendent le produit adapté à une utilisation en magasin ou lors de ventes en porte à porte.
- **Secteurs des services publics et des télécommunications** : Apparound compte un nombre important de déploiements dans les secteurs des services publics et des télécommunications. Son produit est particulièrement adapté à la vente d'abonnements simples .
- **Déploiements à grande échelle** : Apparound CPQ a fait ses preuves auprès des clients d'entreprise ayant un grand nombre d'utilisateurs et de transactions. Il propose des mises à jour de produits fréquentes et tous les clients utilisent la version actuelle. Il offre un SLA de disponibilité de 99,9%.

### *Précautions*

- **Présence sur le marché** : Apparound CPQ a une présence limitée sur le marché. Bien que le fournisseur dispose d'un bureau de vente en Amérique du Nord, la quasi-totalité de ses employés et de ses clients se trouvent en Europe.
- **Configurateur** : le moteur de règles de configuration présente des capacités limitées par rapport aux produits d'autres fournisseurs de ce Magic Quadrant. Apparound CPQ n'est pas adapté à la vente de biens et de services complexes.
- **Gestion des services** : les utilisateurs peuvent vendre des abonnements simples, mais Apparound CPQ ne prend pas en charge la gestion des contrats de service ni la modification ou la résiliation des services après leur vente.

## Bit2win

Bit2win is a Challenger in this Magic Quadrant due to its ability to sell complex solutions across multiple industries and its limited presence outside of Europe. Bit2win is a private company based in Rome. The product integrates with Salesforce Sales Cloud and Microsoft Dynamics 365 Sales for the direct sales channel and with Salesforce Partner Relationship Management for resellers. Bit2win exposes APIs that support composing a custom, self-service application. A live, production implementation was shown during the demo to Gartner. The responsive UI supports mobile tablets, and users can perform some basic selling actions when disconnected from the internet. The product runs on Microsoft Azure, AWS, Google Cloud and the vendor's own data center.

### *Strengths*

- **Product:** Bit2Win is one of the best overall products evaluated in this report. It was among the strongest evaluated for CRM integration, reseller channel, product selection, selling services, pricing, order management and extensibility. It is also one of the most usable products.
- **Utilities industry:** Bit2win has multiple deployments at large utility companies. The product includes robust support for selling and managing subscriptions, industry-specific functionality for needs-based product recommendations and estimating the cost of service over time. It integrates with SAP IS-U and Fincons' youtiverse.
- **Large-scale deployments:** Several deployments of Bit2win have over 10,000 sales users.

### *Cautions*

- **Market presence:** Bit2win has limited market presence and few customers in North America.
- **Upgrades:** At the time of our research, there were relatively few deployments of Bit2win, but the companies running it were using five different versions of the software.
- **Long-term deal negotiation:** Bit2win has no out-of-the-box, Day 0 capability for long-term deal negotiation.

## Conga

Conga is a Challenger in this Magic Quadrant because it provides an extensive set of product features running on a relatively new and unproven platform. Conga is a private

company based in Broomfield, Colorado, U.S., with the majority of customer deployments in North America. Conga offers a broad set of CPQ capabilities for companies selling complex goods and services. Conga CPQ has a native Salesforce Lightning Web Components UI integrated with Salesforce Sales Cloud and Salesforce Partner Relationship Management. Conga CPQ also has a stand-alone web UI that offers significantly better response times and user experience. Customers can compose a custom, self-service application from Conga's APIs. The product runs on AWS and IBM Cloud.

### *Strengths*

- **Pricing functionality:** Conga CPQ's out-of-the-box pricing functionality is among the best evaluated for this Magic Quadrant, with robust support for list pricing, cost-plus pricing, volume discounts, attribute-based pricing, sales agreements, promotions and bundles.
- **Server architecture:** Conga CPQ runs on a modern, composable, high-performance server architecture that enables commerce through a wide range of sales channels.
- **Extensibility:** Conga CPQ is highly extensible with support for custom objects, extending standard tables, constructing new UIs over any object, scripting, state workflow, analytics and the staging of updates between environments.

### *Cautions*

- **Salesforce UI:** The native Salesforce UI used by sales end users is slow and difficult to use. Conga now offers a much better UI built on standard web technology.
- **New platform:** Conga CPQ was released on the new Conga platform in 2024. A lot of code has changed and/or moved platforms. Gartner clients should check Conga references running on the new platform to confirm the product is stable and performs well.
- **Innovation:** Conga has not delivered significant functional enhancements for several years because it has been focused on fixing the platform.

## **CSG**

CSG is a Niche Player in this Magic Quadrant due to its limited market presence and its focus on the telecommunications industry. It is a public company based in Englewood, Colorado, U.S. CSG Quote & Order has a native Salesforce Lightning UI integrated with Salesforce Sales Cloud. Resellers can sign into the standard CSG Quote & Order UI to create quotes

and orders. Customers can compose a custom self-service application from CSG Quote & Order's APIs. The product also supports Telemangement Forum (TMF) API standards. The product runs on AWS, Microsoft Azure, Google Cloud Platform, Alibaba Cloud, IBM Cloud, Oracle Cloud and the vendor's own data center.

### *Strengths*

- **Telecom industry:** CSG Quote & Order offers a full suite of CPQ, order management and billing solutions for the telecommunications industry. CSG Quote & Order CPQ is the best solution evaluated in this report for the complex requirements of B2B telecommunications providers. The product supports TMF API standards and has excellent support for selling and managing complex service contracts.
- **Order management:** The CSG product suite includes one of the most comprehensive order decomposition and orchestration engines evaluated for this report. Users can place, track and make changes to in-flight orders.
- **Composability:** CSG Quote & Order CPQ has good support for composing custom and self-service applications, compared with other vendors evaluated in this report. The product is built on an extensive library of fast, well-documented web service APIs. Current customers are successfully selling complex telecommunications products on websites built over those APIs.

### *Cautions*

- **Extensibility:** CSG Quote & Order CPQ has powerful state workflow and process workflow engines and allows users to add custom attributes to some key entities. However, it lacks support for custom entities.
- **Usability:** The CSG Quote & Order user experience is marred by a clunky integration with Salesforce CRM, having to transition back-and-forth to Microsoft Excel to maintain pricing rules, having to maintain proposal templates in HTML and being limited to placing extension attributes in a special area of the screen.
- **Upgrades:** At the time of this research, CSG Quote & Order CPQ customers were running five different versions of the software. This raises questions about why customers are not upgrading to the latest version. Having many versions in production will be difficult for the vendor to sustain as the product is more widely deployed.

Epicor is a Niche Player in this Magic Quadrant because of gaps in its product footprint and its relatively small market presence. Epicor is a private company based in Austin, Texas, U.S. Epicor CPQ is a good option for companies that need a visual configurator for complex manufactured goods, especially if they use an Epicor ERP solution. It has a productized integration with Salesforce Sales Cloud for the direct sales channel. The reseller channel is enabled by an integration with Salesforce Partner Relationship Management, or Epicor CPQ can be accessed stand-alone. It supports skinning the UI to match the branding of the reseller and can be exposed as a punch-out quoting tool in the reseller's custom portal. Users can embed the Epicor CPQ visual configurator into a third-party self-service digital commerce platform, and all functionality is accessible through REST APIs. The product runs on Microsoft Azure.

### *Strengths*

- **Visual configuration:** Epicor CPQ offers excellent native support for 2D, 3D and augmented reality (AR) visual configuration, as well as productized integration with computer-aided design (CAD) generation systems. The 3D rendering engine is one of the first to leverage the photorealistic capabilities of WebGPU.
- **Reseller channel:** The product includes a robust integration with Salesforce Partner Relationship Management as well as support for skinning the UI to match the branding of the reseller and exposing a punch-out quoting tool in the reseller's custom portal.
- **Rule engine:** Most logic, rules and customization features use the Epicor CPQ Snap rule engine, which has an innovative drag-and-drop UI that supports logical conditions, state workflow and visual programming. These features make Epicor's product relatively easy for administrators to learn.

### *Cautions*

- **Selling services:** Epicor CPQ has no out-of-the-box support for selling services. The product is not recommended for selling services or mixed baskets of products and related services.
- **Pricing:** Epicor CPQ's out-of-the-box pricing capabilities are among the weakest of the vendors evaluated in this Magic Quadrant. Most pricing logic must be implemented using the Snap rule engine.
- **Propose and negotiate:** While Epicor CPQ supports basic capabilities, such as manual price adjustments, approvals and proposal generation, it lacks more advanced



capabilities, such as line grouping, goal-seeking price adjustments, price recommendations, redlining and electronic signature.

## **Infor**

Infor is a Leader in this Magic Quadrant due to its mature product and focus on the manufacturing industry. Infor is owned by Koch Industries and is based in New York City. Infor CPQ is best-suited for sellers of tangible goods running Oracle E-Business Suite ERP, Infor ERP or Microsoft Dynamics 365 Finance and Operations. Direct sales users are supported by integrations with Salesforce Sales Cloud and Microsoft Dynamics 365 Sales. Resellers can directly log into Infor CPQ. Infor Rhythm for B2B e-commerce integrates with Infor CPQ and provides a self-service sales catalog and check-out flow. A productized integration between the Infor CPQ configurator and Adobe Commerce Cloud is also available. Infor has live customers that have composed a custom, self-service selling experience using Infor CPQ APIs. The Infor configurator can be deployed as a composable UI. The product runs on AWS.

### *Strengths*

- **Selling complex tangible goods:** The Infor CPQ configurator supports selling and manufacturing complex goods with one of the best rule administration tools we evaluated. The product also supports high-quality 3D visualization of the configured products, bill of materials (BOM) generation and CAD drawing generation.
- **Composability:** Infor CPQ's out-of-the-box composability capabilities are among the best evaluated in this report. In the demo shown to Gartner, Infor demonstrated robust APIs for new product configurations, updating configuration models and proposal generation.
- **Extensibility:** The Infor CPQ platform supports extensibility via custom objects, webhooks and rule-based scripting. It has built-in support for analytics and excellent tooling for moving changes from development to test to production environments.

### *Cautions*

- **Selling services:** Infor CPQ's support for selling and managing services is among the weakest evaluated for this Magic Quadrant. Gartner does not recommend the product for selling or managing services.
- **Deal negotiation:** Infor CPQ's out-of-the-box deal negotiation capabilities are among the weakest evaluated for this Magic Quadrant.

- **Large transactions:** In the demo shown to Gartner, Infor CPQ could not handle very large transactions with more than 1,000 lines. Gartner clients should verify the application can handle their most complex transactions with acceptable end-user response times.

## Oracle

Oracle is a Leader in this Magic Quadrant due to its market presence, comprehensive CPQ functionality and the scope of its quote-to-cash offerings. Oracle is a global public company based in Austin, Texas, U.S. Oracle CPQ is best suited to enterprise-scale implementations, particularly when the customer has other Oracle software assets, such as Oracle Sales, Oracle Commerce, Oracle Service, Oracle E-Business Suite, Oracle Fusion or Oracle Order Management. The direct sales channel is supported by integrations with Salesforce Sales Cloud, Microsoft Dynamics 365 Sales and Oracle Sales. The product integrates with Salesforce Partner Relationship Management and Oracle Sales PRM for the reseller channel. Most user actions are exposed as headless REST APIs and customers can compose a self-service commerce experience. Oracle Commerce is sold as an add-on for Oracle CPQ. The product runs on Oracle Cloud.

### *Strengths*

- **Selling services:** Oracle CPQ is among the best vendors evaluated for ordering and managing recurring services. The product supports renewals, amendments, suspensions, terminations, order stacking and service billing via an integration with Oracle Subscription Management cloud.
- **Performance:** The Oracle CPQ user experience is consistently fast. Oracle demonstrated editing a very large transaction and generating a very large proposal with excellent response times.
- **Large deployments:** With more than 10 deployments of 10,000 users or more, Oracle CPQ is proven to work at enterprise scale.

### *Cautions*

- **Administration:** Some Gartner clients report that Oracle CPQ is difficult to implement and maintain over time. Although the pricing administration UI received a refresh recently, it is still overly complex. Other parts of the administration UI are dated and have a steep learning curve compared to competitors' products.

- **Product selection:** The Oracle CPQ sales catalog is basic, with no subcategories, faceted search or product comparison. It is not recommended for selling a large number of products.
- **Demo versus actual product:** The demonstration shown to Gartner was feature-rich and attractive, but it required a lot of customization to set up. Potential clients should verify whether what they are shown by the Oracle sales team is part of the out-of-the-box product or an example of what can be customized with additional effort and cost.

## **PROS**

PROS is a Leader in this Magic Quadrant due to its deep and broad product capabilities and growing market presence. PROS is a public company based in Houston. PROS Smart CPQ is a good option for selling a wide range of tangible goods, especially when integrated with the vendor's price optimization solutions. The direct sales channel is supported by integrations with Microsoft Dynamics 365 Sales and Salesforce Sales Cloud. The reseller channel is supported by an integration with Salesforce Partner Relationship Management. PROS exposes a complete set of high-performance APIs for composing a digital commerce experience and has multiple live customers. The product runs on Microsoft Azure.

### *Strengths*

- **Usability and performance:** PROS Smart CPQ has a fast, intuitive end-user interface and one of the best product catalogs evaluated for this Magic Quadrant. The product easily handled a 10,000-line quote during the demo shown to Gartner.
- **Propose and negotiate:** PROS Smart CPQ has comprehensive support for negotiating sales transactions, including line grouping, manual price adjustments, goal-seeking price adjustments, expected sales compensation, intelligent price recommendations, approvals, proposal generation and electronic signature.
- **Long-term deal negotiation:** PROS Smart CPQ is one of a few vendors evaluated in this report with significant out-of-the-box capabilities for authoring long-term agreements between a vendor and a customer. Users can define long-term discounts for products, product lines and shipping, as well as capture volume commitments, receive AI-based guidance, approve the deal and make bulk updates to multiple agreements.

### *Cautions*

- **Selling services:** PROS Smart CPQ's out-of-the-box support for selling and managing services is limited. The product is not recommended for selling services.
- **Order management:** PROS Smart CPQ has no out-of-the-box capabilities for order decomposition, order tracking or changing booked orders.
- **Visual configuration:** PROS lacks native support for 3D visual configuration.

## Salesforce (Salesforce Industries)

Salesforce is a Leader in this Magic Quadrant with its Salesforce Industries CPQ product due to its global reach and extensible platform. Salesforce Industries CPQ is targeted at the telecommunications, media, energy, advertising sales, insurance and health insurance industries. Salesforce continues to invest in the Salesforce Industries CPQ product despite focusing on its new Revenue Cloud product (see the Honorable Mentions section).

Salesforce Industries extends the standard features of Salesforce Sales Cloud and Salesforce Partner Relationship Management to support the direct sales and reseller channels.

Customers can build a self-service commerce UI that calls the APIs exposed by Salesforce.

However, most APIs require use of a Salesforce cart. The product can be deployed on AWS (Hyperforce) and the vendor's own data center.

### *Strengths*

- **Extensibility:** Salesforce Industries CPQ's functionality builds on and extends standard Salesforce objects. Its applications leverage all the powerful extensibility, workflow, analytics and collaboration capabilities of the Salesforce platform. In addition, Salesforce Industries provides unique capabilities for declarative, guided process flows (Omniscripts); flexible UIs (Cards); interface implementations; and a library of plug-and-play, industry-specific features.
- **Industry specificity:** More than 200 telecom, media and energy customers, and more than 150 health and insurance customers, use Salesforce Industries CPQ's capabilities. Many of these customers have more than 1,000 sales users.
- **Order management:** Salesforce Industries CPQ's built-in order decomposition and orchestration capabilities are among the best we evaluated for this report. Users can amend and cancel in-flight orders.

### *Cautions*

- **Performance:** Prospective customers should pay close attention to the end-user response times of the Salesforce Industries CPQ application. Gartner regularly hears complaints about response times during client inquiry calls. In the demo shown to Gartner, common actions such as launching the configurator, processing rules during a configuration, amending or renewing a subscription, and repricing were slow.
- **Configuration:** The Salesforce Industries CPQ configuration rule engine has limited capability compared to products from other vendors evaluated in this Magic Quadrant. The configuration UI is both unintuitive and highly complex to administer.
- **Composability:** Although Salesforce Industries CPQ has APIs to support most user actions, Gartner believes the performance of those APIs is too slow to underpin a usable self-service commerce experience. The APIs rely on the transaction being stored in Salesforce and thus do not support true composability.

## SAP

SAP is a Leader in this Magic Quadrant due to its global reach, rich product capabilities and growing market presence, especially in the SAP installed base. SAP CPQ is well-suited for companies that sell simple or complex manufactured products through multiple channels, especially if they use SAP S/4HANA Cloud or other SAP ERP solutions. It integrates with a wide range of CRM platforms (Microsoft Dynamics 365 Sales, NetSuite, Salesforce Partner Relationship Management, Salesforce Sales Cloud, SAP Sales Cloud, Oracle Siebel CRM and SugarCRM). The CRM integration is flexible and declarative. Users can connect one CPQ instance to multiple CRM platforms. Users can compose a self-service solution on top of the web service APIs exposed by SAP CPQ, although SAP was not able to demonstrate any live customers to Gartner. The product runs on Microsoft Azure.

### *Strengths*

- **Product selection:** Product selection is a strength of SAP CPQ. It provides a rich sales catalog, powerful search, product comparison, rapid order entry, eligibility checking, saved favorite configurations, prepick pricing and guided product recommendations, driven by attribute filtering rules or SAP's own machine learning algorithms.
- **Configuration:** The configurator has a flexible UI and supports most advanced requirements, including attributes and reusable subassemblies. The condition/action rule engine is one of the most powerful and flexible that we evaluated.

- **Propose and negotiate:** SAP CPQ has good support for negotiating sales transactions, including manual and goal-seeking price adjustments, intelligent price recommendations, payment schedules, and electronic signature. Machine-learning-driven approval probability allows sales users to graphically adjust discounts before submitting deals for approval.

### *Cautions*

- **Service management:** Management of services remains a weakness of SAP CPQ. The UI flow for renewals is unintuitive compared to other products in this report. SAP has minimal support for amendments and cancellations.
- **Demo versus actual product:** Several features were customized for the demo shown to Gartner. Prospective customers should check which features shown during a sales demo are out-of-the-box product features and inquire about the depth of productized integrations with other products.
- **Long-term deal negotiation:** SAP CPQ provides no out-of-the-box support for long-term deal negotiation.

### **servicePath**

servicePath is a Visionary in this Magic Quadrant due to its industry focus but limited market presence. servicePath CPQ+ is best suited to industries that sell complex services or solutions composed of goods and services, such as technical service providers, professional services companies, B2B communications service providers, financial services companies and field services companies. The direct sales channel is supported by integrations with Salesforce Sales Cloud, Microsoft Dynamics 365 Sales and HubSpot. Resellers can access extensive functionality in the servicePath web application. Users can compose custom self-service applications using the published APIs, although not all system capability is currently exposed. The product runs on AWS.

### *Strengths*

- **Technical service providers:** servicePath CPQ+ is designed specifically for technical service providers that sell complex solutions, including hardware, software, network access and professional services. These product types are supported out of the box.
- **Selling services:** The product is the best we reviewed for selling and managing services. Users can sell complex services and solutions; however, amendments to existing

contracts are limited to simple products. The financial dashboard and cash-flow modeling tool are unique among the products in this Magic Quadrant.

- **Fast and usable:** servicePath CPQ+ is fast and easy to use.

### *Cautions*

- **Selling complex tangible goods:** servicePath CPQ+ is not recommended for selling complex tangible goods. There is no out-of-the-box support for shipping or visual configuration.
- **Extensibility:** Productized extensibility is limited to look-up tables, adding columns to standard objects and webhooks. Other extensions have to be implemented by the vendor. servicePath CPQ+ lacks tooling to move artifacts between environments.
- **Market presence:** Although growing quickly, servicePath's market presence is small relative to the Leaders in this report.

### **Tacton**

Tacton is a Leader in this Magic Quadrant due to increasing market presence, a well-architected product and a clear focus on the manufacturing industry. Tacton is a private company headquartered in Stockholm and Chicago. Tacton CPQ is best-suited for heavy manufacturers with complex products and visualization requirements. The product includes some lightweight CRM capabilities of its own and also integrates with Salesforce Sales Cloud or Microsoft Dynamics 365 Sales. Resellers are supported by an integration with Salesforce Partner Relationship Management. The product exposes APIs upon which customers can compose a custom, self-service UI. Users can compose Tacton's 3D visualizations in a custom website, but it is not possible to expose the standard product configuration UI. Tacton has live production customers selling complex products through the self-service channel. The product runs on AWS.

### *Strengths*

- **Complex manufacturing industry:** Tacton CPQ is the best solution for complex manufacturers evaluated for this Magic Quadrant. Its constraint-solving configuration rule engine is suited to modeling complex configure-to-order and engineer-to-order (ETO) products. 3D and AR visual configurations are natively supported, as is CAD automation. The ETO workflow and support for complex systems configuration are the best we evaluated for this report.



- **Innovation:** Tacton CPQ is among the most innovative products evaluated for this Magic Quadrant, with support for comparison of two quotes, alternate quote lines, synchronizing updates to a model definition to in-progress transactions and the ability to mount an external catalog within the Tacton CPQ UI.
- **Extensibility:** The application architecture and extensibility features of Tacton's offering are the best evaluated for this report. The platform includes a powerful state workflow engine that controls every object in the system, including calculations and integrations. Logic can be extended with a JavaScript-like language called TPEX.

### *Cautions*

- **Product selection:** Tacton CPQ has a hierarchical sales catalog, product search, basic faceted search and excellent support for reordering previous configurations. However, it lacks support for product comparison, rapid order entry and product recommendations based on a questionnaire.
- **Managing services:** Tacton CPQ has good out-of-the-box support for selling services, including the best support for subscription ramps of any vendor we evaluated for this Magic Quadrant. However, it is not possible to amend or terminate services after they are sold.
- **Pricing:** Tacton CPQ has limited out-of-the-box pricing capability compared with competing products. Price lists, cost-plus pricing, volume discounts and attribute-based pricing are supported, but all other pricing logic must be implemented using formulas and custom objects in the flexible admin UI.

### **Vendavo**

Vendavo is a Niche Player in this Magic Quadrant because of the limited market presence of its CPQ offering. Vendavo is a privately owned company based in Denver. Vendavo Intelligent CPQ should be considered when combined with the purchase of the Vendavo price optimization and management solution. It is best suited to selling simple, or lightly configured, tangible products or simple services. The direct sales channel is supported by integrations with Infor, Microsoft Dynamics 365 Sales, Salesforce Sales Cloud, SAP Sales Cloud and SugarCRM. Direct sales users can access a subset of capabilities when disconnected from the internet. Reseller channel users can launch Vendavo Intelligent CPQ from Salesforce Partner Relationship Management. Customers can build their own self-



service UI on top of the services provided by the platform, although Vendavo only had examples of live customers calling their pricing API. The product runs on AWS and Microsoft Azure.

### *Strengths*

- **Long-term deal negotiation:** Vendavo Intelligent CPQ is the best vendor evaluated in this report for out-of-the-box capabilities supporting long-term agreements between a vendor and a customer. The product provides an intuitive UI for defining and applying group/line-level discounts, AI-based price discount guidance, comprehensive rebate support and the ability for mass agreement updates.
- **Performance:** In the demo shown to Gartner, the response times of Vendavo Intelligent CPQ were consistently fast. Vendavo demonstrated editing a very large transaction and generated a very large proposal with excellent response times.
- **Marketplaces:** Vendavo Intelligent CPQ enables distributors to sell products from multiple manufacturers. Manufacturers upload their products and pricing to Vendavo, then publish products and pricing to a selected group of distributors, which can sell those products through Vendavo Intelligent CPQ. Vendavo Intelligent CPQ then brokers purchase orders back to the manufacturers.

### *Cautions*

- **Complex manufacturing:** Vendavo Intelligent CPQ has an integration with Threekit, for visual configuration, but otherwise lacks the key out-of-the-box capabilities necessary to support complex manufacturing requirements (e.g., BOM generation, routing rules, reusable subassemblies and systems configuration).
- **Selling services:** Vendavo Intelligent CPQ's support for selling and managing services is limited. Gartner does not recommend it for selling services or solutions that include services.
- **Order management:** Vendavo Intelligent CPQ provides limited out-of-the-box capabilities for order decomposition and orchestration and no support for order tracking or order amendment/cancellation.

Yagna iQ is a Niche Player in this Magic Quadrant due to its narrow industry focus. Yagna iQ is a private company based in Dallas. Yagna iQ CPQ is best suited for high-tech companies that sell through a partner network. It integrates with both Microsoft Dynamics 365 Sales and Salesforce Sales Cloud for direct sales. Distributors and resellers are supported by Yagna iQ's own partner management functionality. Yagna iQ has web service APIs that can support a composable self-service UI implementation, although Yagna was not able to demonstrate a live customer website. Mobile users can run Yagna iQ in an iOS or Android app. The product runs on AWS.

### *Strengths*

- **Electronics and high tech:** Yagna iQ supports resellers of Cisco and VMware products with connectors to Cisco Commerce Workspace and VMware Partner Connect.
- **Reseller sales:** Yagna iQ is designed for resellers of high-tech products. The product includes a robust process for signing up and managing partners, as well as support for reseller agreements. It is possible to collect payments and distribute funds to resellers. The product lacks a punch-out ordering UI that users can embed within the reseller's website or intranet.
- **Mobile support:** Mobile users can run Yagna iQ in an iOS or Android app.

### *Cautions*

- **Product capabilities:** Yagna iQ is one of the least capable solutions evaluated for this Magic Quadrant. The product scored in the bottom three of the vendors for the following capabilities: composable, sell tangible goods, long-term deal negotiation, manage order and extensibility.
- **Performance:** Prospective customers should pay close attention to the end-user response times of the Yagna iQ application. In the demo shown to Gartner, common actions such as product search, add to cart and launching the configurator were slow. It took about 30 seconds to recalculate pricing changes to a 1,000-line quote and about 90 seconds to generate a 135-page proposal.
- **Extensibility:** Yagna iQ lacks productized extensibility features. Instead, the vendor is willing to enhance its application based on requests from individual customers. This approach will not be sustainable as its customer base grows, and customers might experience long lead times to make even simple changes.

## Zilliant

Zilliant is a Niche Player in this Magic Quadrant because of significant product gaps and limited market presence. Zilliant is a private company based in Austin, Texas, U.S. Zilliant acquired InMindCloud in December 2023. Rebranded Zilliant CPQ, the solution is best suited for companies running SAP ERP who want to expose existing SAP Variant Configurator models in the front office. It integrates with Salesforce Sales Cloud for direct sales and Salesforce Partner Relationship Management for resellers. Customers can either use the lightweight digital commerce solution provided by Zilliant or build their own self-service UI on top of the APIs provided by the platform. The vendor demonstrated product selection and cart on a live customer website. The product runs on AWS and the vendor's own data center.

### *Strengths*

- **Intelligent price guidance:** Zilliant CPQ integrates with Zilliant's price optimization module, although the current integration is slow and not easy to use.
- **SAP Variant Configurator integration:** Zilliant CPQ can expose existing SAP Variant Configurator models in the front office. This feature can be a useful interim step before redeveloping the product models in a more user-friendly sales configurator.
- **Webhooks:** Zilliant CPQ has extensive support for webhooks that enable integrated systems to respond to events occurring within the product.

### *Cautions*

- **Product capabilities:** Zilliant CPQ is one of the least capable solutions evaluated for this Magic Quadrant. The product was in the bottom three of the vendors for the following capabilities: composable, select products/offers, sell services, configuration, pricing, propose and negotiate, manage order, and extensibility.
- **Large transactions and proposals:** In the demo shown to Gartner, it took an unusable 16 seconds to launch or edit a very large transaction. Generating a very large proposal was also slow, taking about a minute.
- **Manufacturing industry:** Although targeted at manufacturing companies, Zilliant CPQ has limited support for complex product configuration and BOM generation. It has no out-of-the-box support for selling recurring maintenance contracts, routing rules, CAD integration, systems configuration or shipping.

## Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

### Added

The following vendors were added to the Magic Quadrant this year:

- Zilliant

### Dropped

The following vendors/products were dropped from this Magic Quadrant this year:

- ScaleFluidly failed to satisfy the Enterprise Grade inclusion criteria.
- Salesforce CPQ will ultimately be replaced by Salesforce Revenue Cloud and is no longer actively sold by Salesforce.

## Inclusion and Exclusion Criteria

To qualify for inclusion, a vendor must demonstrate that its product(s) satisfy the following criteria:

- **Current.** The product was generally available for sale on 1 January 2024, without restrictions or special approval.
- **Cloud.** The product is implemented in the cloud as defined below:
  - All technology infrastructure is managed either in the vendor's own data centers or those of a third party that is not the end customer.

- The vendor implements upgrades as part of the cloud service. Upgrades are not performed by a third party, managed service provider or the customers themselves.
- The cloud service is licensed on a subscription basis or metered pay for use.
- All major application capabilities (end-user features, administration, schema extension, workflow and scripting) are performed in a web browser. Windows GUI applications, either running locally or on a central server, are not acceptable.
- Customers cannot modify the application source code. All customers run the same code. The vendor does not develop code for a specific customer.
- Vendor delivered at least two upgrades containing new functionality in calendar year 2023. Upgrades may be pushed by the vendor or implemented at a time agreed on by the vendor and the customer.
- **Core CPQ capability.** This product provides out-of-the-box support for all the core capabilities listed in the market definition. The product must score at least 1.5 out of 5 for Configuration, 1.5 out of 5 for Pricing and 2.0 out of 5 for Propose and Negotiate in the live demonstration performed for the Critical Capabilities report.
- **Growing.** The vendor closed new deals for this product for at least 1,500 new sales users (direct + indirect) or average contract value of \$1 million between 1 July 2023 and 30 June 2024. Vendors were required to list the clients, transaction dates, additional user counts and revenue for transactions meeting these criteria in the vendor survey. Expansions within existing clients were allowed, but not renewals of existing seats.
- **Enterprise grade.** The product had at least 25 customers, 10,000 total sales users (direct + indirect) running in production, and at least three companies in production with more than 300 sales users on 1 July 2024. In the vendor survey, vendors were required to list companies and user counts for implementations running in production on the cloud that meet these criteria.
- **Stand-alone.** The product can be purchased stand-alone with no prerequisite to purchase an ERP solution, billing application or price management application. Requiring a particular CRM platform is acceptable.

## Honorable Mentions

**Salesforce (Revenue Cloud):** Salesforce launched a new CPQ solution called Revenue Cloud in February 2024. This product is not included in this Magic Quadrant because it was not available for purchase on 1 January 2024. The product will ultimately replace Salesforce CPQ with a more modern, powerful and composable solution. At the time of writing, Revenue Cloud includes a flexible pricing engine, basic product configurator, shopping cart, document generation, order decomposition and orchestration, contract life cycle management, and a billing engine. An advanced configurator is expected to be released in 2025.

## Evaluation Criteria

### Ability to Execute

The following criteria were evaluated to calculate each vendor’s Ability to Execute. The evaluation was based on an extensive vendor survey, publicly available financial data, a standardized software demonstration, Gartner Peer Insights reviews and Gartner inquiry calls.

#### Ability to Execute Evaluation Criteria

<i>Evaluation Criteria</i>	<i>Weighting</i>
Product or Service	High
Overall Viability	Low
Sales Execution/Pricing	Low
Market Responsiveness/Record	NotRated
Marketing Execution	NotRated
Customer Experience	Low

<i>Evaluation Criteria</i>	<i>Weighting</i>
Operations	Low

Source: Gartner (January 2025)

## Completeness of Vision

The following criteria were evaluated to calculate each vendor's Completeness of Vision evaluation was based on an extensive vendor survey, a standardized software demonstration, Gartner Peer Insights reviews and Gartner inquiry calls.

### Completeness of Vision Evaluation Criteria

<i>Evaluation Criteria</i>	<i>Weighting</i>
Market Understanding	Medium
Marketing Strategy	NotRated
Sales Strategy	NotRated
Offering (Product) Strategy	Medium
Business Model	NotRated
Vertical/Industry Strategy	Low
Innovation	High
Geographic Strategy	Medium

Source: Gartner (January 2025)

# Quadrant Descriptions

## Leaders

Leaders have the Ability to Execute their vision through products, services and demonstrably solid business results in the form of revenue and earnings. Leaders have significant successful customer deployments with multiple proofs of large-scale deployments. They achieve consistently above-average customer experience satisfaction scores. They are often the vendors against which other providers measure themselves.

## Challengers

Challengers are often larger than Niche Players and demonstrate higher volumes of new business. They have the size and product capabilities to compete worldwide, but they might not be able to execute equally well in all geographic areas. Challengers often achieve strong customer experience satisfaction scores. They may lack a strong functional vision or may have failed to deliver compelling new product enhancements during the past 24 months.

## Visionaries

Visionaries are ahead of most competitors in their product plans and understanding of the market. They anticipate emerging and changing needs and move the market into fresh areas. They have a strong potential to influence the market's direction but are limited in terms of execution and/or track record.

## Niche Players

Niche Players offer a CPQ product that lacks some key functional components, may not demonstrate the ability to consistently handle large-scale deployments across multiple geographies or may lack strong sales. These vendors may offer complete portfolios for a specific industry, but face challenges in one or more of the areas necessary to support cross-industry requirements. They may have an inconsistent implementation track record or may lack the ability to support the requirements of large enterprises. Even so, Niche Players sometimes offer the best solutions for the needs of a particular sales organization, considering the price:value ratio of their solutions.

## Context



There are more than 50 vendors in the CPQ applications market, but most did not meet the inclusion criteria for this Magic Quadrant. Almost all Gartner clients are seeking to procure cloud/SaaS CPQ software solutions. Therefore, this Magic Quadrant excludes on-premises products and hybrid cloud/on-premises products that fail to meet our strict definition of a cloud/SaaS application (see the Inclusion and Exclusion Criteria section for more details). New cloud solutions with fewer than 10,000 users in a production environment were also excluded.

The products of vendors included in this Magic Quadrant exhibit significant differences in their functional capabilities. For this reason, the product or service criterion received the heaviest weighting for our evaluation of Ability to Execute. A product's capabilities were determined by a three-hour scripted demonstration.

B2B companies are now demanding quoting and ordering solutions that support all channels of user interaction. In response to this need, this Magic Quadrant places considerable weight on composable, omnichannel capabilities.

CPQ is part of a broader quote-to-cash or "revenue life cycle management" process. Vendors are building or acquiring CPQ, price management, price optimization, rebate management, long-term deal negotiation and recurring billing capabilities to deliver an integrated quote-to-cash suite. This Magic Quadrant evaluates long-term deal negotiation features that enable a salesperson to negotiate all of the terms of how a vendor and a customer will do business over an extended period of time. Although few good solutions for this important capability are currently available, Gartner expects to see meaningful innovation in this area in the next five years.

The heaviest weightings for Completeness of Vision were accorded to each vendor's past execution of its product roadmap and vision, as well as to the level of innovation in its current product.

Gartner recommends using this Magic Quadrant to aid your evaluations and to explore the market further to assess each vendor's capacity to address your unique business problems and technical concerns. Your shortlist should be determined by the complexity and scale of your requirements. This Magic Quadrant is not designed to be the sole tool for creating a vendor shortlist — use it with the companion Critical Capabilities report as part of your due diligence, in conjunction with discussions with Gartner analysts.

Magic Quadrants are snapshots in time. To be impartial and to complete our analysis, we stop our data collection efforts at a consistent time for all vendors. In this case, the survey cutoff date was 31 August 2024, and the product demonstrations were completed by 21 October 2024. Some product capabilities may have changed since then.

## Market Overview

Gartner continues to see significant demand for new CPQ solutions. Buyers are seeking a solution that can underpin both assisted sales channels and customer self-service. Most industries need to sell recurring services. Salesforce and Conga both launched next generation solutions in 2024 that will be a significant factor in the market moving forward.

### ⊕ Evaluation Criteria Definitions

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