

The CPQ evaluation playbook

Choose based on evidence

A CPQ vendor should be evaluated against real quote scenarios and business rules, not just a product demo or claim of being configurable.

Companion Excel workbook

32 commercial CPQ requirements with weighted evidence scores for three vendors, ten acceptance tests, and a practical pilot plan.

Scores are inputs, not endorsements or verified product quality.

Start here

quotepoint.net/resources/cpq-requirements-checklist

Five capabilities to prove

Product data and configuration

Load representative SKUs, required accessories and forbidden combinations. A failing or incomplete configuration must be blocked.

Governed prices and approvals

Quote the same SKU through authorized direct and dealer contexts; test margin and discount exceptions.

Quote, CRM and handoff

Verify a customer-ready document and revision trace. If integrating with HubSpot, test managed line items and check that unrelated manual records remain untouched.

Score demonstrated capabilities

A simple 0 to 5 scale

0 = not demonstrated. 1 = manual workaround. 2 = partial. 3 = meets basic need. 4 = strong fit.
5 = fully demonstrated with satisfactory controls.

Review must-have gaps

Weights help prioritize a comparison but no aggregate score should override a missing compliance, configuration, pricing or security requirement.

Total cost of ownership

Verify subscription terms, implementation and onboarding costs, training, integration, data cleanup and internal administration. Do not treat ROI calculator placeholders as price quotes.

Verify in a bounded rollout

Pilot checkpoints

Week 1: document quote baselines. Week 2: normalize price data. Week 3: configure one product family. Week 4: test approvals and documents.

Week 5: validate CRM reconciliation and user roles. Week 6: review pilot results and accept or reject deployment.

A defensible decision

Measure quote preparation minutes, correction rate, pricing and product accuracy, exception review, adoption and fully loaded costs.

quotepoint.net/resources/cpq-roi-calculator