
CPQ Vendor RFP & Evaluation Template

A working framework for comparing Configure, Price, Quote (CPQ) vendors against your real requirements — not a generic feature checklist.

Built by New Motion IT, a technical implementation partner for CRM, ERP, CPQ, and business-systems integration. This template is free to use whether or not you ever talk to us — it reflects the same evaluation framework we use with our own clients.

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SECTION A — Company and Project Overview

Company: _____

Industry: _____

Project owner: _____

Current CPQ / quoting solution:

Number of users: _____

Target implementation date: _____

Business objectives for this CPQ initiative:

- Reduce time to generate a quote
- Increase quoting/pricing accuracy, reduce revenue leakage from errors
- Support multi-currency or multi-region transactions
- Support new sales channels or go-to-market expansion
- Other: _____

SECTION B — Current Quoting Process

Document the real process before evaluating vendors — the gap between the current process and what a CPQ system actually needs to do is what the RFP should be built around.

Current quoting steps (describe):

Manual activities in the current process:

Approval requirements today:

Pricing complexity (tiers, discounts, bundles):

Product configuration complexity:

Known bottlenecks: _____

Required improvements: _____

SECTION C — Functional Requirements

Check every capability this CPQ initiative genuinely needs:

Product & pricing configuration

- Product configuration rules (dependencies, compatibility, constraints)
- Product bundles and kits
- Pricing rules engine
- Customer-specific / contract pricing
- Multi-currency support

Discounting and approvals

- Discount approval workflows
- Multi-step approval processes
- Parallel approval processes (multiple approvers at once)
- Delegation for unavailable approvers

Quoting, access, and reporting

- Quote document generation and version control
- Role-based access (who can see/edit what)
- Reporting and analytics on quote-to-close performance

SECTION D — Integration Requirements

CPQ rarely stands alone — list every system it needs to exchange data with, and who owns which field, before scoring vendors on “integration capability.”

- CRM (name the platform): _____
 - ERP (name the platform): _____
 - Ecommerce platform, if applicable
 - CAD / PLM systems, if your products require engineering input
 - Product information management (PIM)
 - Order management system
 - Inventory system
 - Billing system / order handoff
 - Real-time APIs vs. batch/webhook sync — which does each integration need?
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SECTION E — Vendor Questions

Ask every vendor the same questions, in writing, so answers are comparable:

- What is your implementation methodology, and what does a typical timeline look like for a company our size?
 - How do you handle integration with [name your specific CRM/ERP]?
 - What does data migration from our current process/system actually involve?
 - What level of configuration vs. custom development does our use case require?
 - What security certifications and data-handling practices do you have?
 - What does ongoing support look like after go-live, and what's included vs. billed separately?
 - What training do you provide for admins vs. end users?
 - What is the realistic implementation timeline, including our own internal resourcing needs?
 - What is the total cost of ownership — licensing, implementation, integration, and ongoing maintenance?
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SECTION F — Weighted Vendor Scorecard

Scoring scale: 0 = does not meet requirement, 1 = partially meets requirement, 2 = fully meets requirement.

Weighted score formula: weighted score = category weight × (vendor score ÷ 2). Each category's weight is worth its full percentage only when a vendor scores a perfect 2; a score of 1 earns half that category's weight, and a score of 0 earns none of it. Add every category's weighted score together for a vendor's weighted total out of 100%.

Requirement Category	Weight	Vendor A	Vendor B	Vendor C	Notes
Functional fit (Section C)	____%				
Integration capability (Section D)	____%				
Implementation approach & timeline	____%				
Support & training	____%				
Total cost of ownership	____%				
Weighted Total	100%				

Example category weights (adjust to your own priorities — these are illustrative, not prescriptive): functional fit 30%, integration capability 25%, implementation approach & timeline 20%, support & training 10%, total cost of ownership 15%. These five weights add up to 100%, so a vendor's weighted total is directly readable as a percentage.

Worked example: under those weights, a vendor who scores a 2 (fully meets requirement) on functional fit earns the full 30 points for that category — $30\% \times (2 \div 2) = 30\%$. The same vendor scoring a 1 (partially meets requirement) on integration capability earns $25\% \times (1 \div 2) = 12.5\%$ for that category. Summing all five categories' weighted scores this way gives that vendor's weighted total out of 100%.

SECTION G — Decision Summary

Top-ranked vendor: _____

Key strengths: _____

Key concerns: _____

Integration risks identified: _____

Budget considerations: _____

Implementation dependencies (internal resourcing, data readiness, etc.):

Final recommendation: _____

Need help evaluating CPQ integration requirements for your specific systems? New Motion IT implements CPQ, CRM, and ERP integrations for B2B and manufacturing businesses. newmotionit.com/cpq-quoting