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New for 2026

50 new questions you need to ask

In your next CPQ RFP

So your CPQ is future-proofed
and future-ready

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Tomorrow's business priorities, yesterday's CPQ?

Businesses everywhere are making moves to expand revenue channels, offer exceptional customer experiences, and support the continued evolution of digital transformation initiatives. But advancing business models and capitalizing on new commerce opportunities takes thoughtful consideration and strategic investment in the background.

With all this change, traditional CPQ isn't up to the task.

In the two decades since CPQ emerged on the scene, virtually every industry has evolved—and in many cases, grown much more complex. But the fact is, most companies are still using a CPQ that was built for simpler times. Sales processes, buyer expectations, the level of complexity of products and deal structures, as well as innovations in commerce have all evolved lightyears from where we all were in the Y2K-era beginnings of CPQ.

To build toward the future, we can't continue relying on a CPQ built for yesterday's challenges. So, how can you evolve your CPQ to meet your needs today and future-proof for tomorrow?



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It starts with revamping your CPQ RFP.

CPQ RFPs haven't evolved at the speed of change, which has led to businesses adopting CPQ solutions that are not aligned with their paths to the future. In other words, many companies—perhaps even yours—have been burned by CPQ solutions that haven't stood the test of time.



Without a modern take on your RFP, your resulting solution may not address the now-term and future challenges CPQ needs to solve. Most businesses need their CPQ to cover a wide variety of needs, including:

- Customization and flexibility
- Efficient implementations
- Data integrity and security
- Extensibility and scalability
- Omnichannel capabilities
- Integration with eCommerce
- ROI

We all know that CPQ should support, streamline, and supercharge buying and selling processes. But, are current CPQ RFPs using the right line of questioning to result in a solution that meets this evolving list of business needs? In most cases, the answer is no.

So, let's change the game. Modern businesses need a revamped set of RFP questions that will ultimately guide you to a future-ready and future-proofed CPQ solution. So let's get into the list...

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SECTION 1

Configuration & rules engine

In a CPQ RFP, you'll obviously want questions that focus on a vendor's configuration capabilities. Here, you'll want to ask questions that speak to the philosophical approach behind a vendor's solution and uncover how well the configurator and rules engine align with where your business is today and whether or not it can easily support where you're heading tomorrow.

In this section, you'll want to see answers that speak to the need for flexibility and scalability over the long term. Watch out for answers that appear to lock you into one approach or a rigid rules structure, and seek out details and proof points that demonstrate the vendor's ability to deliver an advanced configuration experience that's fit for the future.

Watch out for answers that appear to lock you into one approach or a rigid rules structure

1. Would you describe your configurator as product-based or attribute-based? Why is your model the right one?

WHAT TO LOOK OUT FOR

The answer to this question will indicate how flexible and adaptable their configurator is, or is not. Product-based solutions are generally good for simple product selections, without guided selling. Attribute-based generally allows for a more needs-based and solution-based experience, but doesn't support product picking as easily, which you may need. If the solution supports both approaches, you'll likely be covered no matter what.

HOW SERVICENOW WOULD ANSWER

ServiceNow CPQ is a complete configure, price, quote solution built on an attribute-based model—giving sellers a faster, more flexible way to create accurate, customer-ready quotes. Our attribute-based configuration approach makes selling more intuitive for every user, whether it's a rep in a guided workflow or a buyer in a self-service experience. There's no need to memorize complex product catalogs or SKU lists—sellers can build perfect-fit solutions based on customer needs, reducing errors and saving valuable time.

At the same time, ServiceNow CPQ's Product Picker capability supports traditional product-based selections when needed, blending both approaches into one seamless experience. With this hybrid model, our solution gives organizations the most flexible and intuitive way to configure, price, and quote any solution—empowering sellers to move faster, serve customers better, and sell across every channel.

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2. How does your solution process rules? Is your configurator described best as a constraint-based engine, serial rules engine, or solving engine?

WHAT TO LOOK OUT FOR

The devil is in the details with this one. For serial rules engines (the most common type used), make sure to ask about what is required of the admin when it comes to rule-ordering and hierarchies.

Constraint engines typically require “fewer rules,” but they generally run into limitations from an experience standpoint. Be sure to ask how the vendor’s constraint engine handles guided selling, constraint resolution pop-ups, and complex multi-dependency rules.

Solving engines can intelligently process rules so that only relevant rules are processed for any given user selection. This approach leads to enhanced performance and experience.

HOW SERVICENOW WOULD ANSWER

ServiceNow CPQ is powered by an advanced solving engine—a modern approach that delivers the highest levels of efficiency, speed, and scalability across the entire configure, price, quote process.

Unlike legacy rule engines, the solving engine intelligently processes only the rules relevant to each selection, instantly evaluating thousands of dependencies to generate accurate, compliant configurations in real time. This allows sellers to move faster, admins to maintain less, and businesses to scale seamlessly as complexity grows—without the burden of rule ordering or hierarchies.

With ServiceNow CPQ, organizations gain a high-performance foundation that keeps selling simple, even when products and rules aren’t.

A solving engine approach offers the greatest efficiency, speed, and experience

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3.

How does your tool support complex configuration, such as configuring complicated or custom combinations of products, software, and services in one single quote?

WHAT TO LOOK OUT FOR

Many CPQ tools will be highly specialized around just one of these product types, but will struggle when attempting to support the flexibility needed for the nuances of all three. Make sure to ask for examples of customers doing this today.

4.

How does your solution support configurations that require complex rules with multi-faceted calculations and variables?

WHAT TO LOOK OUT FOR

Some CPQ tools will suffer from performance issues when overloaded with complex calculations and math functions. Others won't even support those functions at all and require external calculation engines or custom dev work. Ensure you get a good sense of how specifically an admin will be able to easily craft and maintain these calculation based rules over time, as this can be a massive resource drain on your team if not addressed correctly.



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5. How does your configurator support the selling of complex deal structures and/or subscription models with custom segments, ramps, etc.?

WHAT TO LOOK OUT FOR

It takes a uniquely flexible configuration engine to support complex multi-part deal and subscription configurations. Pay close attention to how the vendor describes its approach to handling challenging deal requirements and look for answers that demonstrate a blend of consolidated configuration, high flexibility, and strong performance.



6. How does your configurator enable us to pass data from the sales configuration process to downstream and back office systems, e.g. ERP, MRP, Billing, OM, etc.?

WHAT TO LOOK OUT FOR

Here, you'll want to understand if the vendor supports passing information downstream and how the process works. If your business requires a manufacturing BOM that differs from the information you provided in a quote, for example, is that included in the vendor's solution or will that have to be managed elsewhere?

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7. Can your configurator replace our ERP/engineering configurator? If yes, why should it?

WHAT TO LOOK OUT FOR

Configurators in CPQ are a lot more powerful than they used to be. As part of your CPQ evaluation, it could be a massive cost-saving measure to see if your next CPQ configurator can replace or severely augment your ERP/engineering/production configurator. Some solutions today are able to completely replace your production BOM configurator. Others will not, in which case you'll be stuck maintaining two configuration models still.

8. Can your configurator replace our order management configurator? If yes, why should it?

WHAT TO LOOK OUT FOR

Many organizations end up maintaining separate configuration models for quoting and order management, which creates costly duplication and room for errors. As part of your CPQ evaluation, look for a solution that can extend configuration logic seamlessly into order management—so that what's sold is exactly what's delivered. The right CPQ should carry validated configurations, pricing, and rules directly through to fulfillment, eliminating rework, manual validation, and data mismatches between systems. Solutions that can't do this will force you to maintain multiple configuration layers and risk misalignment between sales and operations.

9. Does your configurator support the simultaneous creation of a sales BOM and manufacturing or provisioning BOM, or would we re-enter information in a separate process?

WHAT TO LOOK OUT FOR

Many CPQ tools can only generate a sales BOM, leaving operations teams to manually rebuild manufacturing or provisioning BOMs later—a major source of delays, errors, and cost. Look for a CPQ that can automatically generate both sales and manufacturing BOMs in one process, using shared configuration logic. This ensures what's sold aligns perfectly with what's built, provisioned, or fulfilled, without duplicate work or disconnected data flows. The best solutions will also allow flexible data outputs for ERP or production systems, maintaining synchronization from quote to production.

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SECTION 2

Admin experience



Naturally, in a CPQ RFP you'll need to ask about administration. Here, it's important to ask questions that help to illuminate how simple (or not) the solution will be for your IT admins to set up, manage, and support. As you design this section of the RFP, think about your company's IT culture, tech stack, and how you would ideally see a CPQ fit into the picture.

Watch out for answers that indicate a CPQ will require heavy IT involvement on an ongoing basis, as well as any answers that convey the sense that the solution won't be able to grow with your business over time.

Key concepts to look for in answers are ease, comprehensiveness, extensibility, and scalability for the long term.

10. Will our administrators need to learn new skill sets or coding languages in order to master the use of your solution?

WHAT TO LOOK OUT FOR

Many CPQ tools will require administrators to know or learn a custom scripting language. This can be an extremely costly and resource-intensive aspect of CPQ maintenance over time. Additionally, requiring people to work with legacy tools or coding languages may limit a company's hiring pool and lead to issues with retaining top talent. Ask vendors to get specific about what will be required and what training would be needed.

HOW SERVICENOW WOULD ANSWER

At ServiceNow, we pride ourselves on having the most intuitive UI for CPQ administrators. CPQ professionals do not need to learn or obtain any additional skills or coding languages in order to make the most of ServiceNow CPQ. All rules are able to be created and managed by your existing business admins, and any necessary additional scripting can be done in a standard Javascript editor with intelligent assistance from our AI assistant.

Our point-and-click approach to rule-building and rules management helps to save time and frustration typically associated with CPQ management. To add even more speed and effectiveness, our AI functionality enables you to leverage artificial intelligence to create advanced scripting rules using a natural language interface and intelligently optimize rules all within ServiceNow CPQ.

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11. Is rule-ordering necessary in your application? Is it the responsibility of the administrator to maintain the rule order?

WHAT TO LOOK OUT FOR

This is a deeper dive on a previous question regarding how rules are processed in your CPQ tool. This will have massive implications on the effort required to maintain over time.

HOW SERVICENOW WOULD ANSWER

Because ServiceNow CPQ leverages a solving engine, no rule-ordering is required. Our solving engine intelligently processes only the relevant rules to any given selections made in the configuration process, without needing hierarchies or ordering to dictate what is triggered. This provides a massive administrative and end-user experience advantage.

12. Describe how your administration supports creating and managing rules. For example, how does an administrator create rules in bulk, and how does an administrator create single rules?

WHAT TO LOOK OUT FOR

The goal here is to understand what the day-to-day work will look like for an administrator. Some tools provide simple point and click rule building that makes it easy to make additions and changes. Others will require intense scripting and advanced setup that involves development.

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13. Are rules and fields managed globally? In other words, do you have the ability to create a rule for one product and easily apply it to another product without recreating the rule?

WHAT TO LOOK OUT FOR

Believe it or not, many legacy solutions will not support this. Even if you have identical rules that apply to multiple products, you'll need to re-create those each time for each product. Ensure you get a solution that supports global reusability to save your administrators time, so they don't need to waste it on redundant work.

14. How does your solution support the administrator's ability to debug, troubleshoot, and audit rules, rule relationships, and administrative errors?

WHAT TO LOOK OUT FOR

This can be a massive time suck for administrators. Especially when you have complex configuration rules with multiple dependencies, calculations, data callouts, and more, troubleshooting and auditing can slow things down massively. Also consider what happens if your CPQ admin is out of office or leaves the company. How will your new administrators be able to easily understand how your configurations work?

HOW SERVICENOW WOULD ANSWER

ServiceNow CPQ has multiple out-of-the-box tools to support this.

FlightPath is a configuration auditing and troubleshooting tool that lets admins "record" configuration sessions and get a real-time readout on which rules are firing when, and why, in order to more quickly optimize the experience without having to guess.

Hyperjump is another feature that provides a Visual Configuration Management experience – one that allows the admin user to visually see a map of how rules and fields are related to one another to more easily make updates and changes.

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15.

Describe your approach to APIs. How would you describe the level of flexibility and the ease of use of APIs in your solution?

WHAT TO LOOK OUT FOR

All vendors will say they have APIs. Make sure you understand the ease and flexibility of those APIs, as well as the documentation that will be provided.

16.

Is your application headless? Can it be integrated into or exposed externally to any selling channel?

WHAT TO LOOK OUT FOR

At any point in the future, will you want/need to extend configuration and quoting to channels like eCommerce, dealer portals, etc.? If so, you'll want to make sure you partner with a vendor that is truly headless and composable, making it easy to extend the experience. Most CPQ vendors will say they can do this, but dig into the process of how this would actually work to understand if it's really supported.



All Vendors will say they have APIs…

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17.

Describe your certifications & practices around data security.

HOW SERVICENOW WOULD ANSWER

One of ServiceNow's core values is to always put our customers first, which includes prioritizing data privacy and security.

ServiceNow holds **dozens of certifications** for data security, including the Schellman certification process for ISO 27001, the world's gold-standard information security management framework. In addition, ServiceNow's continued compliance with various regulatory requirements, such as GDPR, HIPAA, and CCPA, ensure that our customers can trust in our data security practices no matter their industry, location, or business model.

18.

Is your application SaaS cloud-based? Are there any aspects of your application that require on-prem implementation?

WHAT TO LOOK OUT FOR

Be very careful here! Many of the most prominent CPQ solutions have been around for over 20 years, and there are aspects of their administration experience that aren't yet available in the cloud. For every vendor you evaluate, make sure not to skip this step.

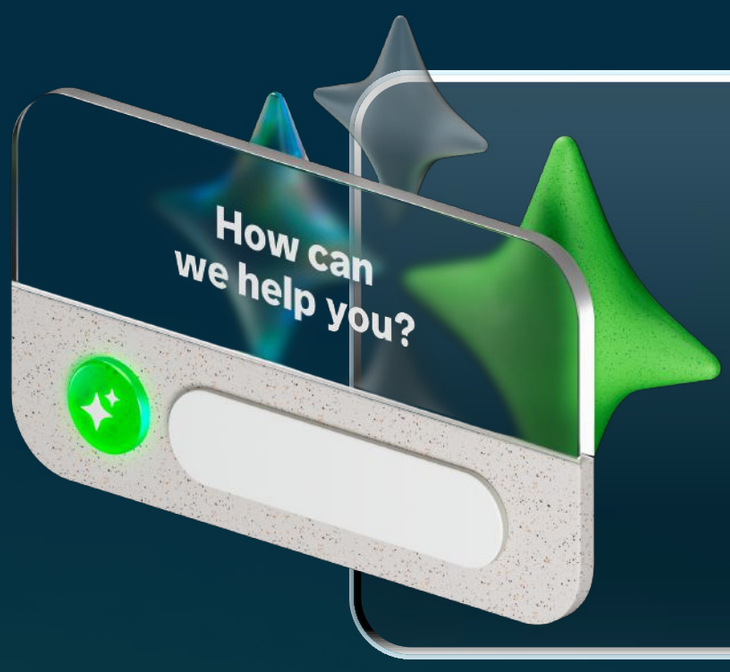
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SECTION 3

Sales & end-user experience

When it comes to CPQ, user adoption is a crucial piece of the puzzle, so it will be imperative that you ask questions in your RFP about the sales and end-user experience. This is where you want to invite the vendor to illustrate what the seller experience is like in their solution so that you can decide if it will be a good fit for your organization.

In this section, be sure to watch out for answers that convey the sense that your sellers will need to spend more time than necessary in a CPQ tool in order to get value from it. At the same time, be on the lookout for answers that showcase a solution's ability to flex to what sellers need to be effective today and what they may require to excel in the future.



Be on the lookout for answers that showcase a solution's ability to flex to what sellers need

19. How flexible is your end-user interface? Would we have the ability to create selling layouts that best fit our users?

WHAT TO LOOK OUT FOR

Many CPQ solutions have very rigid and monolithic configuration tools. Ensure you get the flexibility needed to support whatever experience you might need now, and in the future.

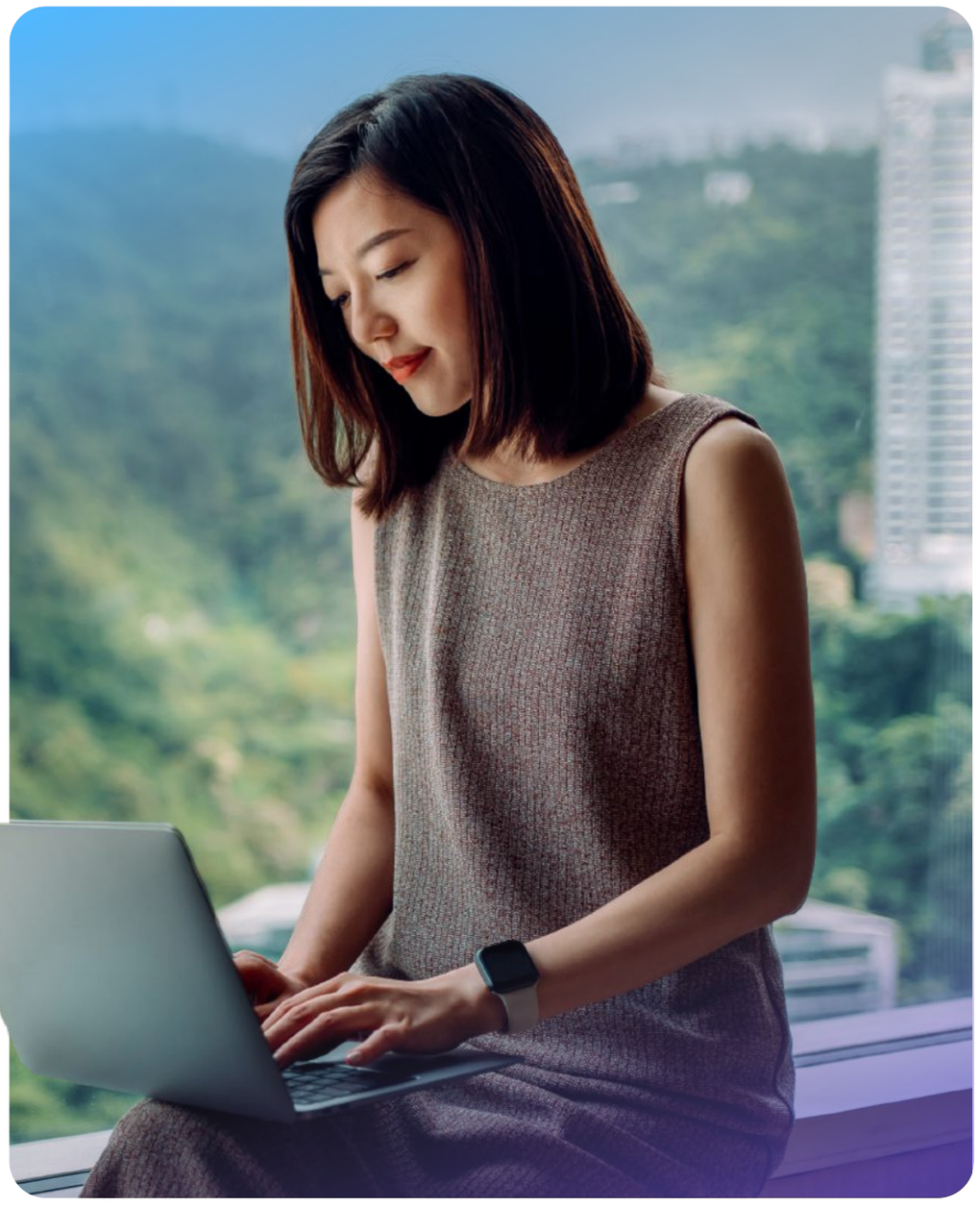
HOW SERVICENOW WOULD ANSWER

ServiceNow CPQ was built with flexibility in mind. We offer our customers the ability to customize their UI with our native UI layout builder using dynamic field types and field displays so that you can create the experience that is best for your sales teams. Or, because we're built headless, you can plug ServiceNow CPQ into ANY custom front-end UI that you build or already have. With our point-and-click setup, headless architecture, API-first model, and AI tools, you can spin up a custom UI with ease.

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20.

What guided selling capabilities does your solution offer?



WHAT TO LOOK OUT FOR

"Guided selling" can mean a lot of different things to different people. For some, it's just a filtering experience that filters a product catalog. For others, it simply means capabilities that tell you what is and is not compatible. For others, it means having a real-time selling assistant with you every step of the way. What kind of guided selling will serve you best?

HOW SERVICENOW WOULD ANSWER

ServiceNow CPQ's guided selling capabilities were inspired by consumer commerce experiences. We provide intuitive product discovery, buyer-friendly configuration, and intelligent product recommendation tools that all support a modern approach to guided selling.

Our messaging rules allow you to easily provide alerts, recommendations, and warnings at any stage of the configuration experience to guide users appropriately.

ServiceNow CPQ allows you to dynamically hide and show fields and field options based on previous selections, as well as auto-determine field options, saving the end-user steps and ensuring they're only shown compatible options.

The very nature of our attribute-based configurator also lends itself to guided selling, as users can be prompted to input customer needs and requirements, and seamlessly match the best-fit products to those inputs, without needing intimate knowledge of the product portfolio.

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21. Can your solution offer the ability to recommend products from a catalog based on inputs and selections of fields and attributes?

WHAT TO LOOK OUT FOR

The ability to recommend products intelligently to sales reps, and end-customers via self-service is more or less expected out of any selling solution. These standards have been set by the Amazon-like experiences consumers get online. If you want this CPQ solution to be your last, make sure you get one that supports this.

22. How does your solution support product discovery for sellers? Does your solution support product comparisons?

WHAT TO LOOK OUT FOR

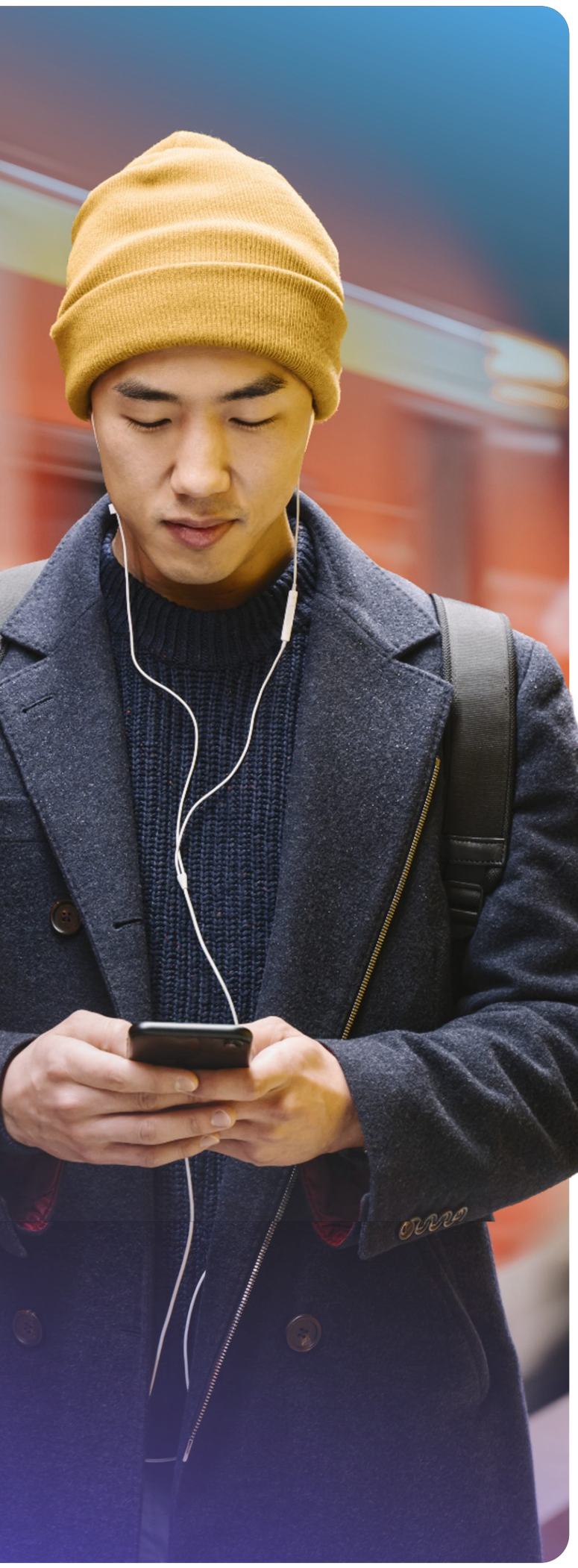
Many CPQ tools make sellers start from a product list instead of a customer need, forcing them to know exactly what to search for. Look for a solution that enables true product discovery, guiding sellers (or buyers) through questions, attributes, and use cases to recommend the right products or configurations automatically. The best systems will also support side-by-side product comparisons, helping sellers evaluate options, trade-offs, and pricing differences in real time. This kind of guided, intelligent discovery accelerates selling, improves confidence, and ensures customers get the best-fit solution every time.

23. Can you offer flexibility for sellers who prefer attribute-based configuration vs. product-based configuration?

WHAT TO LOOK OUT FOR

Most CPQ tools offer one or the other. The most flexible tools will offer both to support ANY end-user experience you want to provide.

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24. Does your solution offer the ability to show messages with warnings, alerts, or recommendation messages to guide the user to optimal configurations?

WHAT TO LOOK OUT FOR

Do you want a solution that puts the burden on your users to configure the perfect-fit products for your customer? Or one that does some of the work for them, that makes them smarter sellers, and helps customers get exactly what they need?

26. Can your solution automatically select and determine products to add to your quote based on previous selections?

WHAT TO LOOK OUT FOR

A modern CPQ should not just validate selections, but actively guide and automate them. Look for a solution that uses rules or AI-driven logic to automatically determine and add the right products, components, or bundles to a quote based on prior choices. This not only saves sellers time but also ensures accuracy, compliance, and consistency across every quote. The most advanced solutions can handle dynamic dependencies across complex product sets, adjusting configurations in real time as selections change.

25. Can your solution offer the ability to dynamically hide or show fields and options based on previous selections?

WHAT TO LOOK OUT FOR

This is a critical guided selling component that can save sellers hours of time. Ensure the solution you get has this.

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27. Can your solution prevent a quote from being saved when incompatible configurations are selected?

WHAT TO LOOK OUT FOR

Validation should be built into your CPQ, not left up to manual checks or after-the-fact approvals. Look for a solution that can proactively prevent invalid or incompatible configurations from being saved or submitted to ensure only compliant, order-ready quotes move forward. The best systems provide real-time feedback during configuration, flagging conflicts immediately and guiding sellers to valid alternatives. Without this capability, teams risk downstream errors, costly rework, and damaged customer trust.

28. Describe the performance of your solution. How do you ensure there is no lag time or performance issues for end-users?

WHAT TO LOOK OUT FOR

Are there limitations that will cause performance issues? Is an “update” or “save” button required in between steps? This is a challenge as old as time for CPQ users. Performance issues of any kind should never be acceptable. Ask this question in tandem with previous questions around how the rules engine works. That will give you the due diligence needed to understand if the solution you’re choosing is truly “future-proofed” for the modern user who expects perfect performance every time.

29. Are there limitations or performance degradation issues with the number of allowable quote lines?

WHAT TO LOOK OUT FOR

Performance limitations are one of the most common—and costly—pain points in legacy CPQ systems. Many tools slow down or even fail when quotes include large volumes of line items, forcing sellers to break quotes apart or work offline. Look for a CPQ that can scale to thousands of quote lines without degradation, maintaining real-time responsiveness as complexity grows. The right architecture, typically one built on a high-performance solving engine and modern data model, should handle large enterprise use cases with speed and stability, even under heavy load.

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SECTION 4

Omni-channel & innovation

As more and more businesses seek innovative ways to expand revenue channels, it will be important for your CPQ RFP to include a section on omnichannel capabilities. Here, you are looking for evidence that the vendor can support the growth and transformation of your business, and your expansion as needed. Even if you are not selling omni-channel today, it's inevitable that every company will need to consider omni-channel selling in the near future. Ensure you get a solution that supports this.

Watch out for answers that might leave you feeling stuck in a status quo situation. Instead, look for answers that speak to extensibility, smart innovations, and demonstrated ability to power new selling and commerce strategies as businesses grow.



30. How does your solution support omnichannel configuration?

HOW SERVICENOW WOULD ANSWER

ServiceNow CPQ was built to simplify the configuring and selling of products across any channel, including marketing, in-house sales, dealers and distributors, eCommerce, etc. We are built headless and API-first so you can build your configuration experience once and then extend it to all your sales and commercial channels the way you want.

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31.

What guided selling capabilities does your solution offer?

HOW SERVICENOW WOULD ANSWER

ServiceNow is all about putting AI to work for people, so we believe artificial intelligence should play a practical, transformative role in the future of CPQ. Our AI capabilities help administrators build faster, sellers sell smarter, and organizations operate more efficiently.

AI accelerates configuration setup and rule creation, reducing manual scripting and simplifying complex logic. It also enhances selling experiences through guided recommendations and intelligent quote generation.

We continue to expand AI across CPQ, making it easier to maintain complex models, optimize performance, and deliver a more intelligent, connected selling experience.



32.

How can we extend your solution to support self-service eCommerce transactions?

WHAT TO LOOK OUT FOR

Don’t just solve for now, solve for the future. If you want this to be your last CPQ you ever need to implement, you will need it to support self-service transactions seamlessly. Even if you are not selling through these channels today, your competitors are starting to. And you’ll need to start sooner rather than later. The CPQ category is changing rapidly, and the innovators know that supporting self-service and e-comm transactions is a necessary component for the future.

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33. Can customers create quotes via a public website using this tool? Can self-service users request a custom quote for the cart they have configured online?

WHAT TO LOOK OUT FOR

Not all CPQs support self-service or online quoting. Look for a solution that can embed directly into your website, allowing customers to configure products and request quotes using the same rules and logic as sellers. The best systems enable guided, accurate self-service experiences across every channel without requiring separate tools or configuration models.

34. Does your solution support channel switching, or the ability for a user to configure in one channel, and then pick up that configuration across different channels?

WHAT TO LOOK OUT FOR

Providing customers with the ability to pick up where they left off across channels makes it much easier for them to complete their purchase without any added friction or frustration

35. Describe how configuration can be extended to channel partners, dealers, and distributors?

WHAT TO LOOK OUT FOR

Here, it’s important to understand whether the vendor can support different experiences across various channels, and how the UX may differ across internal sellers, dealers, etc.

36. How are you approaching AI in your CPQ solution roadmap?

Look for a vendor with a practical AI strategy focused on real outcomes like simplifying setup, improving accuracy, guiding sellers, and speeding deals. Avoid vague add-ons; the best AI is built directly into configuration, pricing, and quoting workflows.

37. What 3 new innovations are you most excited about in your product roadmap?

You want to be sure you're choosing a CPQ vendor that's actively investing in product innovation and has a clear roadmap for when they expect to deliver new features and functionality.

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SECTION 5

Customers & partners



What's an RFP without questions asking for customer success stories? It goes without saying that you will want to include questions that are meant to uncover proof that the vendor can deliver.

In this section, look for examples and case studies that demonstrate the vendor's ability to understand your own business needs and speak to the types of goals you want to achieve. Use this section to ask about partnerships as well, so you can get a clear picture of the implementation and ongoing servicing experience you could expect as a customer.

38. How has your customer base grown or expanded over the last year?

HOW SERVICENOW WOULD ANSWER

In 2025, ServiceNow began offering CPQ capabilities following the acquisition of the former Logik.io. We are actively growing the **customer base** and continue to expand our cross-industry offerings.

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39. How long do your implementations take?

HOW SERVICENOW WOULD ANSWER

At ServiceNow, we pride ourselves on making implementations as fast and simple as possible. Together with our talented system integration partners, we have successfully implemented ServiceNow CPQ for some customers in less than 5 months. In one recent implementation, we migrated 50,000 contracts from disparate configurators to ServiceNow CPQ in one day without any impact on day-to-day operations.

You should expect a vendor to provide examples that show they understand the types of challenges you face



40. Can you share a customer example that illustrates that you understand our level of sales complexity and future-state goals?

WHAT TO LOOK OUT FOR

This question is so important! While you don't need to expect a vendor to share a customer example that's an exact match for your business, you should expect a vendor to provide examples that show they understand the types of challenges you face—and the opportunities you have.

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41.

Do you have customer examples that prove your solution increases sales efficiency?

WHAT TO LOOK OUT FOR

Look for verifiable proof, not anecdotes. Strong vendors should share quantifiable results—like reduced quote time, faster approvals, or higher close rates—from real customers. Be cautious of vague claims without metrics or references.

42.

Do you have customer examples that prove your solution speeds time to revenue?

WHAT TO LOOK OUT FOR

Ask for examples showing how the solution accelerates the quote-to-order or quote-to-cash process. The best vendors can demonstrate measurable reductions in sales cycle time and faster order conversion through automation and system integration.

43.

Do you have customer examples that prove your solution decreases administration resources necessary?

WHAT TO LOOK OUT FOR

A modern CPQ should simplify administration, not add to it. Look for examples where administration hours, rule maintenance, or IT dependencies were significantly reduced through point-and-click configuration, global rule management, or automation.

44.

Who are your system integration partners? Can you share examples to demonstrate successful implementations with your system integration partners?

WHAT TO LOOK OUT FOR

Strong CPQ vendors have established SI partnerships with proven implementation success. Ask for customer stories or references that highlight collaboration quality, deployment speed, and post-implementation outcomes.

45.

Who are your technology partners?

WHAT TO LOOK OUT FOR

Evaluate the ecosystem strength of the vendor. The best solutions integrate seamlessly with CRMs, ERPs, commerce platforms, and AI tools. Look for a partner network that enhances interoperability, innovation, and long-term support.

46.

Can you describe your integration capabilities with our existing CRM and sales solutions?"

WHAT TO LOOK OUT FOR

Understand whether the integration is native, embedded, or loosely connected. True platform alignment—shared data models, real-time sync, unified UI—will determine scalability and reliability. Avoid integrations that depend heavily on middleware or custom APIs.

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SECTION 6

Customers & vision



This section may be an obvious one, but it’s too important to gloss over. Here, you’ll want to ask questions in a way that gets to the heart of the vendor’s story so that you can build confidence in the company’s leaders, approach, and vision.

In practice, you’ll likely be working with this vendor for a long time, so it’s critical to choose a partner that aligns with your values and speaks to your ambitions.

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47. Who are your company's leaders and what is their CPQ expertise?

HOW SERVICENOW WOULD ANSWER

ServiceNow CPQ is built on decades of category-defining CPQ innovation. In 2023, ServiceNow began its acquisition of Logik.io, a next-generation CPQ company founded by Christopher Shutts and Godard Abel—two pioneers who created the CPQ category itself.

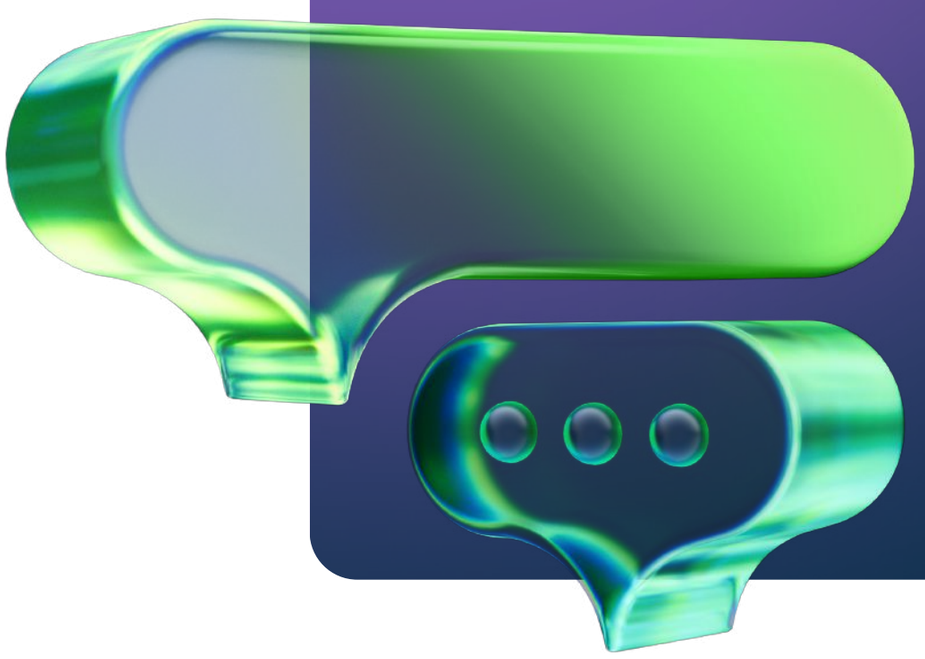
Shutts co-founded BigMachines in 2000, which became the foundation of modern CPQ before being acquired by Oracle. Abel later founded SteelBrick in 2014, acquired by Salesforce in 2016. Together, they launched Logik.io in 2021 to redefine CPQ for the modern era with a faster, smarter, and more flexible architecture.

By acquiring Logik.io, ServiceNow united that heritage of CPQ innovation with the power of the ServiceNow AI Platform, delivering a fully integrated, AI-powered CPQ and Sales CRM solution built for today's complex, omnichannel selling environments.

48. How has your company's CPQ business grown over the last year?

WHAT TO LOOK OUT FOR

Growth tells you whether a vendor is gaining real traction or standing still. Look for measurable signals like customer expansion, new industries served, platform investments, and analyst recognition. Consistent growth and innovation indicate a vendor with momentum—and one likely to keep investing in the product long term.



Choose a vendor actively investing and innovating in CPQ

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49. Can you explain your company's vision and values?

HOW SERVICENOW WOULD ANSWER

win as a team · create belonging · WOW our customers · stay hungry & humble

It all started in sunny San Diego, California in 2004 when a visionary engineer, Fred Luddy, saw the potential to transform how we work. Fast forward to today—ServiceNow stands as a global market leader, bringing innovative AI-enhanced technology to over 8,100 customers, including 85% of the Fortune 500®. We are committed to putting AI to work for people and making the world work better.

50. How would we, as your customer, experience your company's vision and values in practice?

WHAT TO LOOK OUT FOR

Ask for specific examples of how the vendor's values translate into customer benefits—like transparent support, collaborative roadmap planning, or rapid response to feedback. Look for proof that their culture drives customer success, not just sales. Vendors that can demonstrate this in action are more likely to be long-term partners.

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Worksheet:
Plan your CPQ RFP

What needs to change?

Write down specific challenges you have with your current CPQ. What types of issues do you want to leave behind? What is a deal-breaker in a new CPQ solution?

Critical questions

Jot down questions here that you want to add to your next RFP.

What is most important?

List the features, capabilities, and/or results that are most important to you in making a switch to a new CPQ. Ask team members and stakeholders to weigh.

What might the future hold?

Think about how your needs may change over the long term. Might your business model evolve or change? Might your buyers demand new types of commerce experiences? Can your CPQ deliver for your future scenarios?

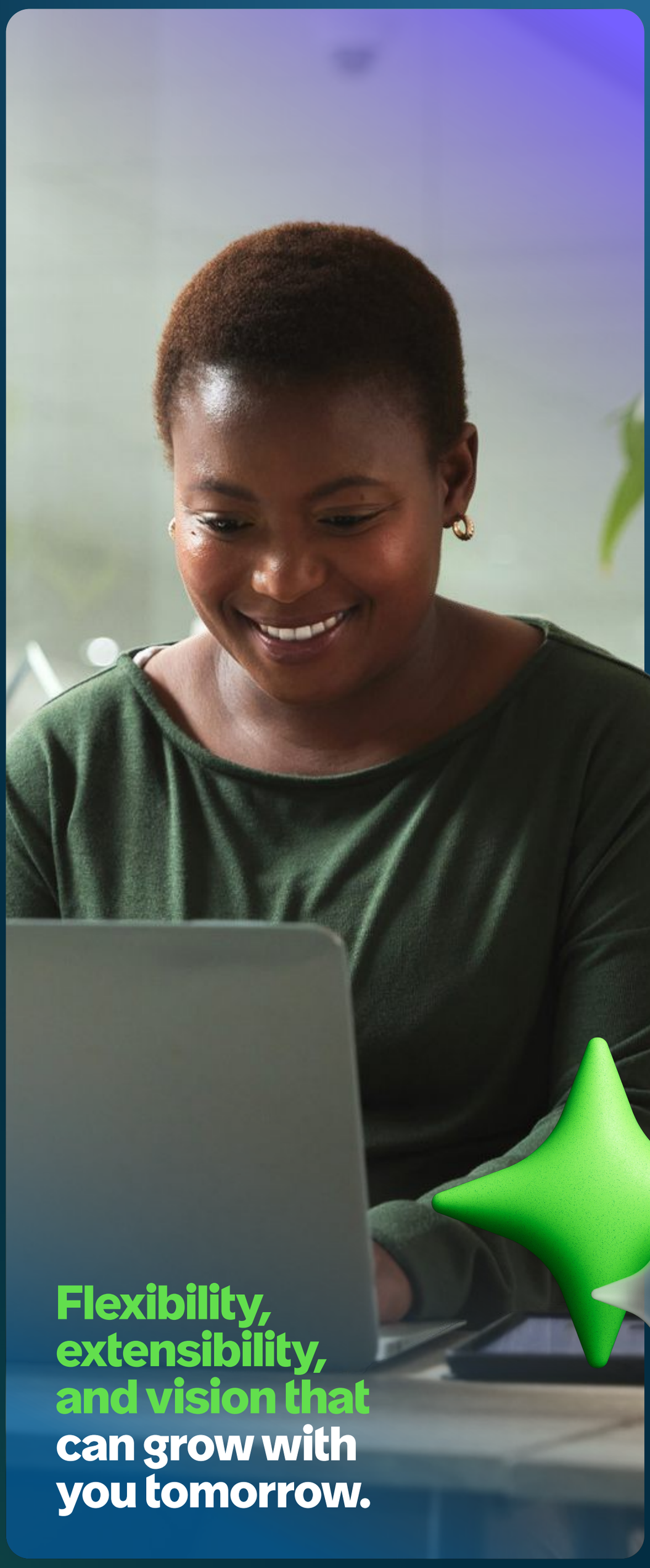
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(Con)figuring out the future of CPQ

At the end of the day, copy-and-paste RFP questions from years gone by won't serve you as you seek a CPQ for the future of your business.

It's crucial to revamp your CPQ RFP questions to ensure the resulting solution you implement is aligned with your business' goals and future plans (even if they haven't yet emerged). This means formulating a series of questions that seek to uncover how well a vendor can support your needs for efficiency, performance, and UX today – while offering the flexibility, extensibility, and vision that can grow with you tomorrow.

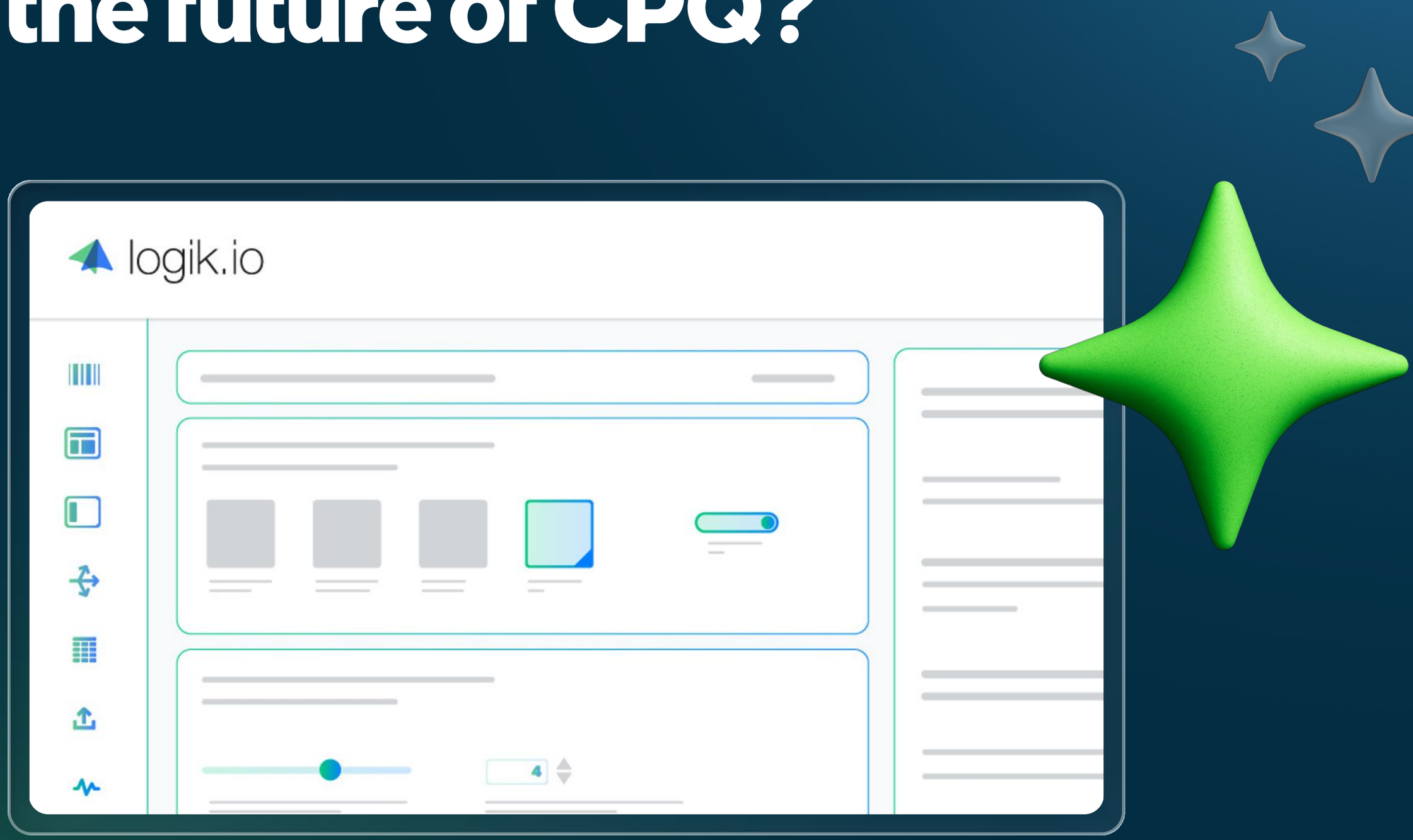
While we gave you some example answers to consider throughout our list, at ServiceNow, we're CPQ game-changers who are game to answer whatever mix of questions you land on. Our team is future-ready and our solution is future-proofed for whatever is now and next in complex sales and digital commerce.



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Now here is our question to you...

Are you ready to meet the future of CPQ?



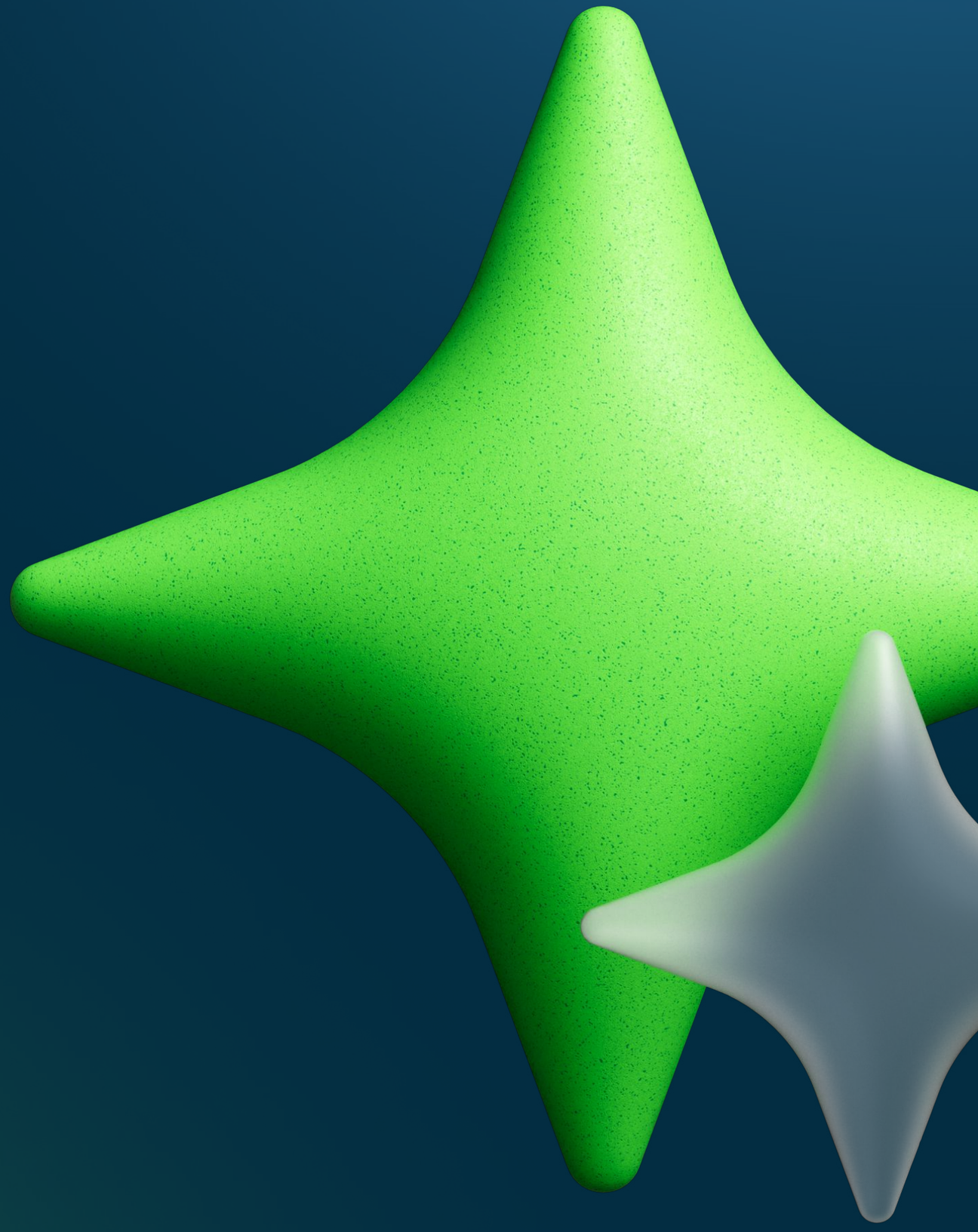
Meet ServiceNow CPQ

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About ServiceNow

ServiceNow is the AI Platform for Business Transformation. ServiceNow is a single platform that unites any AI, any data, and any workflow to transform how work gets done across every corner of your business—so people spend less time on the stuff they don't love and more time on the stuff they do. Simply put, we make the world work better for everyone by putting AI to work for people.

More info



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